City and County of San Francisco

OFFICE OF THE CONTROLLER
CITY SERVICES AUDITOR

Mission Housing Development Corporation:

A Complex Organization That Needs to Improve Its Controls Over Housing and Service Provision and Requires City Monitoring to Preserve the City's Investment

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December 16, 2005

CITY AND COUNTY OF SAN FRANCISCO
OFFICE OF THE CONTROLLER

Ed Harrington
Controller

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December 16, 2005

Report Number 04043

Larry Del Carlo
President, Mission Housing Development Corporation
474 Valencia Street Suite 280
San Francisco, CA 94103

Dear Mr. Del Carlo,

The Controller's Office, City Services Auditor presents its audit report concerning the Mission Housing Development Corporation (MHDC). In summary, the audit objectives were to detail the structure of MHDC and the City's relationship with MHDC and its affiliates, determine the extent of recent changes in the organization and their effects on the agency's provision of services and housing, and determine whether MHDC effectively manages its housing assets. The major audit findings include:

- Mission Housing is a large and highly complex affordable housing organization with multiple ownership structures, funding streams and compliance requirements for its 36 properties (including 34 existing and 2 under development). It provides approximately 1,000 units of housing to over 1,900 tenants with units ranging from single-room occupancy hotels to family housing. Many types of tenant services are provided by MHDC or by organizations operating in MHDC sites (Chapter 1).

- The City has invested approximately $19 million in bonds, $17 million in loans, and $4 million in contracts and grants with MHDC in the last five years alone and has a significant investment in the organization and in ensuring that it protects its tenants and assets appropriately (Chapter 1).

- Although it has made recent hires of new staff, MHDC lacks enough appropriate financial expertise internally and relies heavily on outside consultants, on its property management subsidiary and on its external auditors to perform basic financial, accounting and asset management functions. As a result, the organization has had difficulty with financial compliance and budgeting, and its ability to perform critical asset management functions such as long-term maintenance and liability management is weak (Finding 2-A).

- Critical health, education and other human services are provided in MHDC housing units through several nonprofit organizations and by MHDC's own staff. Such services are part of an affordable housing model that helps tenants retain and stabilize their housing, employment and family lives. MHDC receives funding that is predicated on providing this type of service model. However, MHDC does not
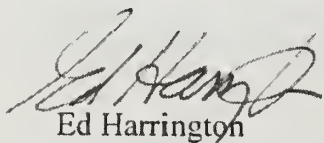
have comprehensive knowledge of the services provided at its own sites and as a result, there are both gaps and overlaps in services to tenants. In addition, the organization is at risk for failing to comply with financing terms that require direct service provision (Finding 3-A).

- MHDC's role has changed in the last five years from providing tenant services directly to coordinating for services through other organizations.   Since 2000, MHDC withdrew from two City service contracts, failed to win the bidding processes on another, failed to successfully negotiate the terms of two contracts, and has also reduced the number of services coordinators that it employs directly. The organization has experienced conflict over this situation and there are differing ideas expressed in its grant applications, mission statements and other documents. To reduce this conflict and better manage operations, MHDC needs to clarify its approach to providing services and reflect it in relevant documents (Finding 3-B).

The overall audit conclusions are that MHDC needs to strengthen its financial and asset management capacity by hiring and/or retaining enough skilled staff to manage, report on and plan for all of its operations and by setting and improving asset management policies and procedures for itself and its subsidiary. To provide tenant services effectively, MHDC should build a comprehensive knowledge of the services and providers on its sites and better track the loan and regulatory requirements of its funding with respect to services. Finally, MHDC should clarify the mission and purpose of the organization and ensure that these are consistently used and expressed in grant, contract and loan agreements. Taken together, the audit recommendations are good management practices for affordable housing providers and for City contractors specifically-the Controller's Office will work with City departments that have financial and contractual relationships with MHDC and with the organization itself to follow-up on these recommendations.

Mission Housing Development Corporation's response to the audit is attached as Appendix X of this report.   We acknowledge the assistance and cooperation provided to the audit staff by MHDC, its consultants and auditors, by City department staff, and by staff of other nonprofit service providers.

Respectfully Submitted,

Ed Harrington
Controller

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The chapter details the properties, the types of ownership, funding arrangements, property profiles and tenant services provided by MHDC to demonstrate the complexity of the organization and its relationships with the City and other parties.

Mission Housing Development Corporation (MHDC) is a large and complex nonprofit affordable housing development organization that provides an array of housing opportunities and services to low-income San Francisco residents.   MHDC owns or actively manages 34 properties and has two additional properties under development. The organization has approximately 1,000 affordable housing units that house more than 1,900 tenants. Properties range from two-or three-unit buildings to single-room occupancy (SRO) hotels with dozens of units. Tenants include families with children, seniors, single adults and persons with disabilities. In the last five years alone, the City of San Francisco has invested in MHDC with approximately $17 million in loan funding, $19 million in redevelopment bonds, and over $4 million in grants and contracts for affordable housing development, housing rehabilitation, and tenant services.

CHAPTER 2. MHDC NEEDS TO INCREASE ITS INTERNAL CAPACITY TO EFFECTIVELY MONITOR ITS HOUSING ASSETS

Finding 2-A. MHDC does not effectively monitor its housing assets due to its over-dependence on external parties, insufficient information about the condition of its properties, and a consequently weak ability to do strategic asset planning and management.

The audit found that MHDC relies on its external auditors and other professional consultants to perform critical asset accounting and financial reporting functions because it has lacked sufficient skilled accounting and asset-management staff within its organization and also within its wholly-owned property management company Caritas Management Corporation (Caritas) to adequately monitor loan balances or loan compliance. As a result, MHDC did not make loan payments for nearly one million dollars in 2004 to the San Francisco Redevelopment Agency as required in its partnership agreement for one of MHDC's affiliate properties. Its lack of comprehensive and timely loan balance, cash flow, and other financial information affects MHDC's ability to make sound planning and operational decisions. Further hampering MHDC's ability to monitor its assets is the lack of complete and adequate information in monthly reports that are prepared for MHDC by Caritas.

Without complete information, the organization cannot adequately monitor its assets or plan strategically for cost overruns, maintenance and repairs, or mitigate safety and security concerns. MHDC has not taken an active role to improve this situation by making changes to the agreements with its property management subsidiary that would better suit its needs as property owner and MHDC also lacks policies and procedures for the way it monitors and manages its housing assets.

The audit recommends that MHDC hire and/or retain enough skilled finance and asset management staff to track, analyze, and report on all of its properties. MHDC should complete the implementation of recommendations from its external auditors in its 2003 management letter (these recommendations also pertain to strengthening MHDC's financial management staff and its internal controls). MHDC should develop its own set of polices and procedures pertaining to asset management and implement changes to the contents of monthly reports from Caritas in a manner that reflects its needs as the asset manager. These improvements could involve changing management agreements for the properties and/or the master agreement between Caritas and MHDC.

CHAPTER 3. MHDC NEEDS TO IMPROVE ITS CONTROLS OVER SERVICES TO ENSURE COMPLIANCE WITH LOAN AND REGULATORY AGREEMENTS AND ALSO NEEDS TO ESTABLISH A CLEAR AND CONSISTENT PURPOSE

Finding 3-A. MHDC lacks clear and comprehensive knowledge of all tenant services available at its sites and the service requirements outlined in loan and regulatory agreements. The organization is at risk of noncompliance with financing terms and program regulations.

The audit found that MHDC does not have comprehensive information that would allow it to adequately manage the tenant services that are provided at its sites. The service listing attached as Appendix A was constructed by audit staff and required multiple interviews with MHDC staff and review of a wide variety of sources that conflicted in some cases. There is a lack of clarity about services on site and between staff's and management's understanding of the roles and responsibilities of services coordinators. Where services are provided through another community-based organization rather than its own staff, MHDC was similarly unclear about all of the services that are being provided, and in some cases does not have a contract, memorandum of understanding, or other appropriate agreement with the service provider, exposing the organization to unnecessary liability should any incident occur. In addition to the lack of information regarding services, MHDC does not have a comprehensive understanding of the service requirements outlined in its regulatory agreements for each of its properties. As a result of these information gaps, some tenant services are not available consistently, and the organization is at risk of not complying with service requirements that are outlined in loan and regulatory agreements.

The audit recommends that MHDC create a listing or use the listing developed during the audit process to maintain a centralized database of services that are available at all MHDC properties. A written and centralized listing would facilitate staff and

management's understanding of services provided at its sites, allow MHDC to better manage resources, allow services coordinators to collaborate more closely and find ways of making services available to tenants, and close any gaps in service. MHDC also needs to develop a listing of the loan and regulatory requirements for service provision for each of its properties. Used in conjunction with the previously mentioned listing of services available at its properties, MHDC would be able to affirmatively ensure compliance with the service mandates of regulatory and loan agreements. MHDC also needs to update job descriptions or other written documentation for services coordinators so that each coordinator is clear as to their roles and responsibilities. MHDC should enter into MOUs or other appropriate agreements with all entities that provide services at their sites. Finally, MHDC should explore the possibility of establishing a nonprofit affiliate that would manage supportive services at MHDC sites in the same structural capacity that Caritas manages MHDC properties. This structure would clarify MHDC's purpose of being a housing developer, while allowing MHDC to continue to provide services at the sites that are required to have those services under its loan terms.

Finding 3-B. MHDC Tenants still have services available to them although funding for services has decreased. MHDC lacks a clear and consistent approach to tenant services.

The audit found that MHDC's role as a direct service provider has decreased in recent years because it pulled out of two City contracts and was not awarded four other service contracts that it sought to renew. This has meant a reduction of on-site staff at MHDC sites and the discontinuation of some services, including the SF Food Bank at Rich Sorro Commons (multifamily site). Despite these changes, eight staff are still employed by MHDC as services coordinators and provide a wide array of services, including coordination of service provision by outside service providers. Despite this fact, MHDC has struggled organizationally with its role as a service provider and with other issues, such as whether or not it includes moderate-income projects in its purpose—grant applications, mission statements, and other documentary sources are not consistent on these issues.

The audit recommends that MHDC's Board of Directors and management clarify the mission and purpose of the organization and ensure that all internal reports and documents; the articles of incorporation; grant, contract, and loan agreements; as well as external information such as the MHDC website, have a consistent purpose and mission.

INTRODUCTION

In fulfilling the mission of the Office of the Controller to promote efficient, effective, and accountable government within the City and County of San Francisco (City), the Controller's City Services Auditor conducted a performance audit of Mission Housing Development Corporation (MHDC), a nonprofit contractor of the City. MHDC is a nonprofit housing organization that has a complex relationship with the City. This relationship includes providing an array of tenant services and developing affordable housing units. In addition, MHDC has received a variety of City funding to rehabilitate other housing sites that are not owned or operated by MHDC. The City has also contracted with MHDC to work with other nonprofits to provide services for tenants who are not housed at MHDC properties.

The audit came about in three different ways. First, there were a series of allegations from citizens and stakeholders regarding changes in the organization and its provision of housing and services. Next, the Board of Supervisors requested that the Controller's Office conduct a performance audit of MHDC. Finally, as part of a recent effort by the Controller's Office to perform more audits of nonprofit contractors to promote accountability, MHDC was selected as one of the organizations to be audited. According to the requirements of the contracts, grants, and loans that the City has granted to MHDC and in accordance with the investment the City has made in the organization to provide a host of services and affordable housing opportunities to San Francisco residents, the Controller's Office has the responsibility and authority to examine the organization.

MHDC HISTORY & BACKGROUND

Established in 1971, MHDC grew out of the Mission Coalition Organization, which later splintered into several groups, including MHDC, Mission Hiring Hall, and Mission Language and Vocation School. MHDC is a nonprofit, low-income housing developer that has developed affordable housing, including construction of new buildings, rehabilitation of existing structures, design of properties for special needs populations, and technical assistance to other nonprofits. MHDC has provided tenant services in addition to the property management services rendered by its for-profit subsidiary, Caritas Management Corporation (Caritas). Caritas provides property management services to MHDC and other nonprofit organizations. Tenant services provided by MHDC have encompassed a variety of programs, including economic and vocational development, education, and outreach. MHDC has also coordinated efforts to bring in other nonprofit organizations to provide services at its properties, including case management and food delivery. An eleven-member Board of Directors currently governs MHDC, and the members may serve no more than three staggered three-year terms. The Caritas Board of Directors has shared members with the MHDC Board.

MHDC has faced many challenges in recent years, including changes in management and staff turnover. The Board of Directors terminated MHDC's executive director in January 2004 and replaced him with a new director in May 2004. High staff turnover and other personnel issues made it difficult in the past for MHDC to produce financial reports for

the Board and MHDC was unable to produce a budget for 2004. The Board hired a consultant in August 2004 to assess MHDC's fiscal operations, and MHDC hired new fiscal staff in late 2004. MHDC created a deputy director position and appointed someone to that position in August 2004.

An MHDC organizational chart dated June 2005 shows that the executive director is now called the chief executive officer (CEO) and the deputy director is now called the chief operating officer (COO). The CEO supervises the Asset Management Division, the Housing Development Division, and the Human Resources Division. The CEO reports to the Board of Directors and has an executive assistant and a Board clerk to assist him. The COO has a clerk to assist her and oversees the Services Division and the Financial Division. The executive director whom the auditors interacted with during the audit resigned in October 2005 and was replaced by the Board Chair.

Since the year 2000, the City and County of San Francisco has provided MHDC with an estimated $4 million in contracts and grants for the purposes of housing development and service provision. MHDC has also been granted over $17 million in loans for housing development and rehabilitation projects. In addition, the City has issued an estimated $19 million in bonds for MHDC's use. The chart below shows the distribution of the funds across grants and contracts, loans, and bonds since the year 2000.

**Total CCSF Loans, Bonds, Contracts and Grants
Issued to MHDC Since 2000**

Bonds
46%

Loans
43%

Grants &
Contracts
11%
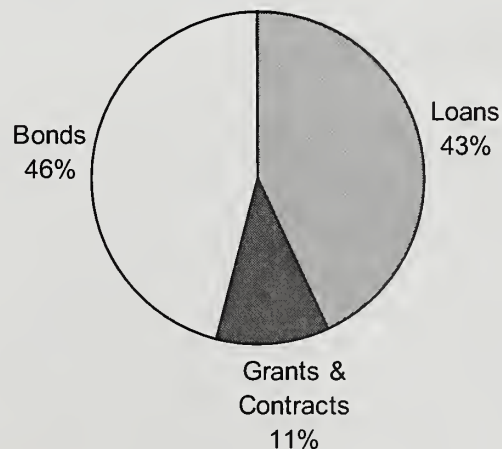
Figure 1

AUDIT SCOPE & OBJECTIVES

Audit staff conducted an extensive and systematic assessment of MHDC to determine a set of audit objectives based on the highest areas of risk to the organization and to the City. Audit staff considered common risks to nonprofits compiled from the Government Accountability Office (GAO), MHDC's prior management letters written by independent auditors, allegations of agency deficiencies, requests by the Board of Supervisors, and

specific risks to agencies within the affordable housing industry. Auditors conducted a high-level internal control review to determine what controls the agency had in place to mitigate against the risks identified, evaluated the controls, and determined the likelihood and consequences of the risks. Based on this risk assessment, the following audit objectives were identified:

- Detail the structure of MHDC and the City's relationship with MHDC and its affiliates

- Determine the extent of organizational changes and their effects on the agency's provision of services and housing

- Determine whether MHDC effectively monitors its housing assets.

The scope of the audit covers the most current three to five years and includes the operations of Mission Housing Development Corporation (MHDC), its wholly owned for-profit property management subsidiary, Caritas Management Corporation, and all single asset corporations, partnerships and properties of MHDC. There are many allegations that were not included in the audit objectives because they scored low in the risk assessment. Many of the allegations were of events that occurred in the past and the auditors did not evaluate the veracity of those claims. However, the auditors note that MHDC has made some progress in strengthening its internal controls and has acquired outside help in many cases as a result of turmoil within the organization. In addition, MHDC currently has a Board of Directors with term limits and keeps minutes of Board meetings. Although a few of the meetings did not have a quorum, the Board reviewed and took action on the items from those meetings at another Board meeting that had a quorum.

METHODOLOGY

The audit of MHDC included a review of financial and performance information. Audit staff:

- Reviewed City loan, contract, and grant agreements that MHDC has had with the Human Services Agency, Department of Public Health, the Mayor's Office of Housing, and the San Francisco Redevelopment Agency;

- Interviewed staff from these departments regarding the level of funding and loans that have gone to MHDC over the years;

- Interviewed MHDC and Caritas staff and the former Chairman of the Board;

- Obtained and reviewed information from MHDC's external auditors and consultants;

- Reviewed Board minutes of the recent years;

- Reviewed property management reports prepared by Caritas for MHDC;

- Reviewed Caritas' policies and procedures for property management;

- Reviewed MHDC agreements and MOUs with other organizations.

Much of the information needed to inform this audit was not readily available and audit staff had to construct a picture of the financial situation of MHDC as well as the number and types of services currently provided by MHDC staff. We reviewed our compilation of information with MHDC and Caritas management, as well as with various City departments. We provided a draft report for MHDC and City staff in order to provide the organization and City staff with an opportunity to provide additional information or correct any errors or omissions.

We conducted this audit according to generally accepted government auditing standards. In accordance with these standards, the audit organization and the individual auditors should be free both in fact and appearance from personal, external, and organizational impairments to independence. As part of maintaining independence in fact and in appearance, we are disclosing that one of the audit staff was offered a position at MHDC during a fieldwork interview. The auditor declined to discuss the offer any further and was reassigned to other tasks within the audit to avoid further direct contact with the MHDC employee who made the offer. Although we believe that this did not impair the independence of the auditor, we are disclosing the incident to comply with the auditing standard.

CHAPTER 1
MHDC IS A COMPLEX ORGANIZATION WITH MANY AFFORDABLE HOUSING PROPERTIES WITH DISTINCT OWNERSHIP TYPES AND AN ARRAY OF TENANT SERVICES

CHAPTER SUMMARY

Mission Housing Development Corporation is a complex organization with many intricate relationships, several sources of funding with various regulatory and reporting requirements, and distinct ownership structures of its properties. Because of the complexity of the organization and its relationships with the City and other external parties, Chapter 1 discusses the various MHDC housing and ownership types, sources of funding for development, changes in housing development, and services provided at MHDC sites.

MHDC HOUSING TYPES

MHDC and its affiliates (defined below) own, control or actively manage the operations of 34 separate properties and two that are under construction. A listing of these properties is provided in Appendix B. Five different target populations are served by these properties and are described in the table below, along with the number of units of each type that MHDC owns or controls.

Property Type	Number of Units	Number of Properties	Description of Property Type
Multi-family housing[1]	704	12	Low-income families
Senior housing[2]	256	5	Affordable housing for seniors
Single Room Occupancy (SRO) housing	314	5	Formerly homeless individuals
Scattered site housing	72	11	Low-to-moderate income families
Other facilities master leased to external organizations	5	3	Group home for addicted pregnant and post-partum women, board-and-care facility for alcoholic women, and a safe house for survivors of domestic violence
TOTALS	1351	36	

Table 1

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[1] Includes one 247-unit property under construction.
[2] Includes one 100-unit property in preconstruction development.

MHDC OWNERSHIP TYPES

MHDC and its affiliates have acquired or developed properties under many different types of corporate structures. MHDC owns nineteen of the properties, which means that MHDC has complete control and 100% ownership of the asset. For five properties, MHDC's affiliate owns 100% of the asset. For the purposes of this report, an affiliate is a nonprofit corporation whose Board members contain MHDC Board members and sometimes staff, and whose operations are managed by MHDC staff. For example, Colosimo Apartments, Inc., is the MHDC affiliate corporation that owns the Colosimo building. Five MHDC staff or Board members are also Board members of Colosimo Apartments, Inc.

Eleven properties have been or are being developed by limited partnerships. Limited partnerships are created to limit the liability of organizations or companies that are investing in a development and must consist of at least one general partner. For all limited partnerships in which MHDC or its affiliates are involved, MHDC or the affiliate serves as the general partner. General partners conduct the business operations of a limited partnership, which means, for this purpose, that MHDC staff are overseeing the operations of the property. Of the eleven limited partnership properties, MHDC is the general partner for two properties and nine properties have been developed by a limited partnership in which an affiliate of MHDC is the general partner.

Most affiliates have only one property for which they are the owners and operators. As general partners, each of MHDC's affiliates have unlimited liability, but since most of these affiliates have only one asset (the property), their exposure to liability is limited to the amount invested by the affiliate. The limited partner is exposed to liability only up to the amount invested. Since the affiliate is a separate organization, MHDC is shielded from liability. However, all of MHDC's wholly owned assets are exposed to unlimited liability should anything occur with the properties in which MHDC is the general partner. These ownership arrangements are common and represent normal liability management.

One property is currently in the planning stages and does not yet have partnerships or affiliates associated with the project. Finally, the last property is one in which MHDC has no ownership. This property is owned by an independent nonprofit that shares three MHDC Board members. Without a controlling number of Board members, the association with MHDC is loose. However, MHDC staff control the operations of the property. Appendix B provides all of the affiliate, partnership, and ownership information as well as the property names and addresses. The following table provides a summary of property ownership categories.

Property Ownership Description	Number of Units	Number of Properties
MHDC owns 100%	370	19
MHDC Affiliate owns 100%	180	5
Limited Partnership owns, MHDC is General Partner	277	2
Limited Partnership owns, MHDC Affiliate is General Partner	487	9
MHDC co-manages operations but does not own	37	1
TOTAL	1351	36

Table 2

FUNDING FOR DEVELOPMENT

Financing of each development is complex and usually involves many sources of funding. For example, outstanding loans for the Maria Alicia multifamily building indicate that the property acquired private sector loans, federal loans, City and County of San Francisco loans, and a loan from MHDC to its affiliate. Another property, Plaza del Sol, used private loans, a loan from the San Francisco Redevelopment Agency, and a loan from the State of California. Every property has a different mix of financing (i.e., combination of loan types) and each loan agreement into which MHDC enters contains a different set of terms with which MHDC must comply. Loan terms are the set of rules by which an organization must abide and maintain compliance in order to prevent default. Many of MHDC's loans require certain populations to be targeted for the development of housing. Another common requirement is limits on the income of tenants. Other types of targeted populations include seniors, persons living with AIDS, and formerly homeless adults. Although MHDC's property management subsidiary, Caritas Management Corporation (Caritas), is involved in preparing the various regulatory compliance reports regarding occupancy and financial status, the ultimate responsibility for compliance with loan and regulatory agreements rests with the owner of the properties.

CHANGES IN MHDC HOUSING DEVELOPMENT

MHDC's housing programs vary from the construction of completely new buildings, to the rehabilitation of existing structures, to the design of properties for special needs populations and technical assistance to other nonprofits. These programs have resulted in the creation of over 1,000 units of affordable housing. Audit staff compiled a listing of all 36 MHDC housing developments and examined the property types and units, as well as the location and completion date. The auditors determined that the development or acquisition of these properties since 1976 spans over six supervisorial districts in San Francisco with the majority of properties and units in District 6 and District 9.

MHDC Properties by District

District 11 — 3%
District 10 — 6%
District 5 — 3%
District 9 — 36%
District 6 — 46%
District 8 — 6%

MHDC Housing Units by District

District 10 — 2%
District 11 — 3%
District 9 — 15%
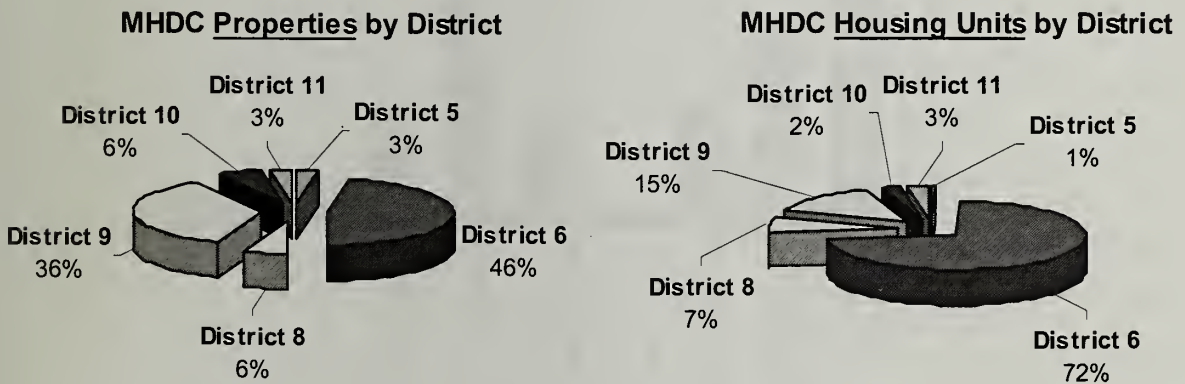District 5 — 1%
District 8 — 7%
District 6 — 72%

Figure 2

Location of MHDC's development has changed over time. From 1976 to 1986, MHDC completed or acquired all its housing properties within Districts 6 and 9 with the exception of one property that lies in District 8. Similarly, from 1987 to 1997, MHDC completed or acquired all its housing properties within Districts 6 and 9 with the

exception of one property, which contains seven units for low-income families and seniors. From 1998 to the present, affordable housing development and acquisition by MHDC expanded into Districts 10 and 11. However, with the exceptions of Alcantara Court (District 8), Bayview Commons (District 10), DePaul House (acquired, District 10), and 5199 Mission (District 11), most of the housing completed or acquired from 1998 to the present was still within Districts 6 and 9.

The types of development completed by MHDC have also changed over time. From 1982 to 1993, the type of property most completed or acquired were scattered sites[3]. During this time, MHDC developed or acquired a total of 11 properties that included 72 units of affordable housing. Since 1993, MHDC has neither completed nor acquired any scattered sites. The development of multifamily housing and affordable senior housing has remained relatively stable in terms of number of units developed but the number of these types of units that are under construction has recently surged. MHDC has neither completed nor acquired any new SRO developments since 1999. In contrast to the period of 1982-1993, MHDC completed three SRO properties with a total of 144 units.

Aside from changes in development and acquisition of housing properties, the number of housing units, vacancy rates and types of tenants at MHDC properties has been stable during the last few years. MHDC properties[4] house an estimated 1,900 affordable housing residents. Auditors estimate that MHDC properties house approximately 500 children and 370 elderly residents. The majority of residents at MHDC properties are Hispanic and the number of African American, Asian/Pacific Islander, and Caucasian tenants range from 180 to 200 based on reported estimates.

Resident Profile

Figure 3

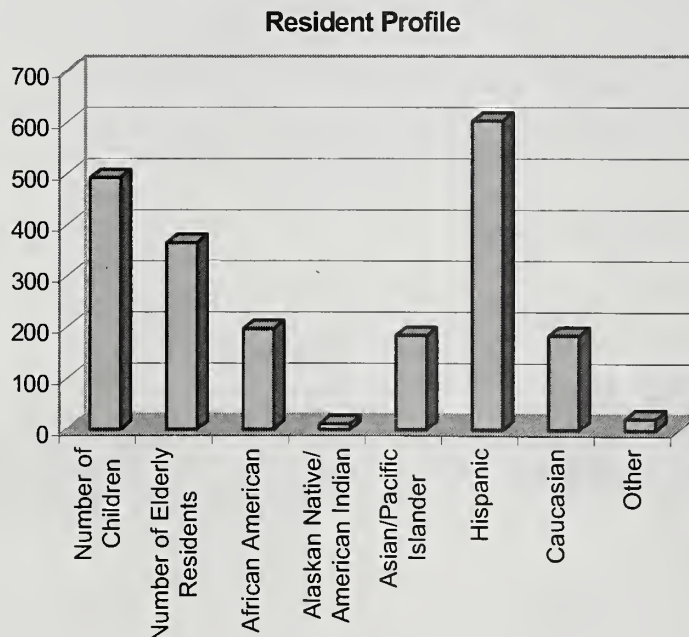[3] Scattered sites are rehabilitation developments for low-income families and seniors that are typically small buildings with a few units.
[4] Excludes the two properties under construction, the three properties that are owned by MHDC but leased to other nonprofit service providers, and two vacant sites (Hotel Dolores and Rondel Place).

MHDC provides services at 16 of the 36 sites that it owns or controls. MHDC has a Director of Resident Programs who provides oversight and direction for services provision and supervises a group of eight services coordinators. The services coordinators work at and are assigned to specific sites. Three services coordinators are assigned one site each, two services coordinators are each assigned four sites, one services coordinator is assigned three sites, and one coordinator is assigned five sites, four of which are also assigned to another services coordinator.

MHDC provides many types of services in varying degrees at its properties. For the most part, services coordinators provide information and referral services, which includes work such as conflict resolution, participating in conferences with case managers, organizing workshops and socialization activities, and assistance with paperwork for public programs such as Medicaid, Medicare, and other welfare programs. Services coordinators also provide assistance in organizing services provided by external organizations. MHDC also provides space for external organizations to provide services, including three properties in which another organization provides intensive case management to residents. Appendix A provides a listing of all services available at MHDC sites and the following table summarizes the number of sites with specific services available.

Type of Service	Service	# Sites at Which Service is Provided
Educational		
	After School Program	5
	Head Start Program	1
Food		
	Bread donation	7
	Food delivered every other week	4
	Food Pantry	2
	Monthly food box	6
	Weekly food delivered	5
Health/Case Management		
	Blood pressure and glucose screening	3
	Case management	3
	Home health services	2
	Intensive Case Management	3
	Physical health education	2
Information and Referral		
	Information and Referral (Family)	7
	Information and Referral (Senior)	4
	Information and Referral (SRO)	3
Other		
	Computer access	4
	Elections presentations	5
	Energy bill payment	4
	Haircuts and shaves	1
	Transportation services	4

Table 3

CHAPTER 2
MHDC NEEDS TO INCREASE ITS INTERNAL CAPACITY TO EFFECTIVELY MONITOR ITS HOUSING ASSETS

CHAPTER SUMMARY

In the affordable housing industry, effective asset management involves the monitoring of housing assets in a manner that protects the physical and financial health of properties and mitigates risks to the tenants of and investors in the properties. The City and County of San Francisco (City) is particularly concerned with how effectively Mission Housing Development Corporation (MHDC) monitors its housing assets because the City has a vested interest in the organization remaining a viable developer of low-income housing in the future. MHDC manages its properties through its subsidiary, Caritas Management Corporation (Caritas), whose role as property manager involves much of the insuring, safeguarding and maintenance of MHDC's properties that keep them viable. However, in its role as property owner, MHDC is responsible for setting the broad policies by which day-to-day property management takes place, and should have comprehensive knowledge of the health of the whole of its portfolio of properties in order to support this strategic role. Audit staff reviewed documents, interviewed staff, and tested reporting mechanisms to determine how MHDC monitors its housing assets and whether that monitoring is effective.

FINDING 2-A. MHDC DOES NOT EFFECTIVELY MONITOR ITS HOUSING ASSETS DUE TO ITS OVER-DEPENDENCE ON EXTERNAL PARTIES, INSUFFICIENT INFORMATION ABOUT THE CONDITION OF ITS PROPERTIES AND A CONSEQUENTLY WEAK ABILITY TO DO STRATEGIC ASSET PLANNING AND MANAGEMENT.

MHDC develops low-income family, affordable senior, and single room occupancy (SRO) housing for formerly homeless adults in San Francisco. MHDC finances the developments from both public and private financial institutions, including federal Housing and Urban Development (HUD) grants, federal Low-Income Housing Tax Credits and California Department of Housing and Community Development Rental Housing Construction Program loans. As indicated earlier, the City has invested in MHDC with over $17 million in loans and an estimated $19 million in bonds for the purposes of affordable housing development and rehabilitation. In addition, MHDC houses an estimated 1,900 residents in its affordable housing units. With this level of investment and number of people dependent on MHDC housing, the organization has a large responsibility for ensuring that it monitors its housing assets adequately.

The funding complexities of low-income housing projects often require developers to establish different economic entities for their properties. Currently MHDC is affiliated with and is responsible for the accounting and financial audits of six distinct 501(c)3 corporations and ten limited partnerships and is performing accounting for two housing projects that are currently under development. For housing developers that have built and

continue to own or control a number of housing projects, the need to maintain many distinct sets of accounting records while not losing sight of their overall financial operations is challenging. Complex organizations such as MHDC require staff who possess adequate skills to report accurately and timely on all of the organization's financial resources and obligations, create realistic budgets for all aspects of operations, and analyze the short and long-term impacts of decisions. In addition, effective asset management necessitates that property owners take an active role in setting policies and expectations for asset management purposes and be able to monitor the performance of its property managers. According to industry standards, property owners should pursue asset management as a systematic plan for, and ongoing oversight of, the management of one or more housing project(s) in furtherance of the project's goals and the organization's mission, and as the active and strategic pursuit of an owner's long term social, physical and financial goals from predevelopment through the administration and disposition of a property or portfolio. If the property owner does not have comprehensive knowledge about its properties, information key to the viability of its housing stock might be overlooked.

MHDC Over-Relies on Various External Parties
To Perform Many of its Crucial Financial
And Asset Management Functions

Audit staff found that MHDC relies on its external auditors and other, more recently retained professional consultants to perform critical asset accounting functions because it has lacked sufficient skilled accounting and asset-management staff within its organization and also within its wholly-owned property management company to adequately monitor loan balances or loan compliance. As a result, staff at MHDC did not make required loan payments for nearly one million dollars in 2004 to the San Francisco Redevelopment Agency (SFRA) for one of MHDC's affiliate properties. Also, MHDC has relied on its external auditors to review expenditures related to its fixed assets, and to formulate year-end adjustments to capitalize costs that have been expensed in error. Furthermore, although MHDC has relied on its external auditors to help it report on the financial operations of MHDC and its affiliates, MHDC failed to inform its external auditors of some property transactions in 2003 and 2004. As a result, these transactions were omitted from the financial statements and as of November 3, 2005, MHDC did not have timely audited consolidated financial statements for 2004.

Our review of the workpapers prepared by MHDC's external auditors to document their work on the 2003 financial audit of MHDC's consolidated financial statements showed that the external auditors engaged in adequate planning and testing, and that we could rely on the work that that they performed. However, our review of the operations of MHDC disclosed two groups of transactions that the auditors had not been made aware of by MHDC administrative or fiscal staff. The first set of transactions involved the acquisition by MHDC in December 2003 of three residential properties by a community-based organization at the request of the City[5]. This assignment included the assumption of three loans associated with the properties.

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[5] The Women and Children's Family Services (WACFS), a nonprofit corporation, owned the three properties. The corporation was dissolved and DPH paid certain expenses related to WACFS closure.

The second set of transactions involved predevelopment costs and an associated loan draw from the SFRA for the Central Freeway Parcel C project during 2004. MHDC opened a bank account into which it deposited a check from SFRA for $242,000. MHDC finance staff had requested authorization from officers of the Board of Directors to open the new bank account, but because this did not happen in a regular Board meeting, it was not reported in the Board minutes, and the external auditors were not aware of the transaction. Although MHDC's external auditors issued a draft report dated June 1, 2005, on MHDC's 2004 consolidated financial statements, they had not issued a final report or management letter for 2004 as of November 2005. MHDC's external auditors stated on September 20, 2005, that they would amend their draft report to include the assigned residential properties and to reflect the activity in the Central Freeway Parcel C project.

In addition, our review of the audited consolidated and affiliated financial statements of MHDC showed that required payments for 2004 from Mission Bay Affordable Housing (Mission Bay) limited partnership to SFRA in the amount of $948,000 had not been made. According to SFRA, the loan payments from Mission Bay were not made until June 2005. However, Mission Bay's partnership agreement required that the payments be made before December 31, 2004. Further, our review of one sample asset monitoring report from MHDC found that it had overstated its 2003 expenditures on the sample property, which were reported at $51,000. We later determined that the external auditors had proposed a correcting adjustment to reduce expenditures on this property by $17,000 as a result of their fieldwork.

According to both its external auditors and its outside management consultants, MHDC's accounting department was not adequately staffed. The management comments produced by the external auditors as part of the 2003 MHDC audit state that the functions of the Controller were not being performed and that internal controls should be strengthened. MHDC's external auditors prepared a summary of management comments for six years (1998-2003) which showed that this concern had also been expressed in the audit firm's 2002 management letter. Likewise, the outside management consultants stated in a report dated September 7, 2004, that financial reports required to manage operations were not being produced. Later in 2005, MHDC brought in another management consultant to compile information pertaining to the operational costs of MHDC properties and to conduct an analysis of the financial statements and the independent auditor's report drafts of its properties. MHDC's executive director stated that the agency's former director of finance had been unable to produce budgets as requested, which is why MHDC had retained a consultant to provide a fiscal assessment. Although MHDC hired a new chief financial officer in December of 2004, many of its fiscal and management staff are relatively new.

MHDC was the City's designee and the terms and conditions of transfer of the three properties was set forth in the agreement by and between the City and County of San Francisco, MHDC and WACFS, and the related purchase and sales agreements between MHDC and WACFS. All agreements were executed in March 2003.

Compounding its staffing deficiencies on the fiscal side of its operations, MHDC also experienced management turnover when MHDC's Board of Directors placed its executive director on administrative leave in January 2004 and appointed two interim co-executive directors at that same meeting. In May 2004, the Board of Directors appointed an executive director, who was the executive director that audit staff interacted with. The executive director was out on leave from approximately the middle of March 2005 to the end of May 2005 and resigned in October 2005. At that time, the Chairman of the Board was appointed as the new executive director.

MHDC is at risk for several reasons due to its over-reliance on consultants. Most important is that without skilled finance and asset management staff, MHDC cannot ensure that it meets the terms of its existing loan agreements and that it has adequate cash flow for ongoing operations and current development projects. Without proper staffing, MHDC could continue to miss critical payment, reporting, and compliance obligations to funders. This could cause funders to provide fewer loans and grants for MHDC's future development projects. In addition, MHDC may be unable to make sound planning and operational decisions due to lack of comprehensive and timely cash flow and loan compliance information.

MHDC's over-reliance on its external CPAs is also of concern because its external CPAs may not be able to continue to prepare MHDC's audited financial statements. Recent auditor independence guidelines that are part of the 2003 revised Government Auditing Standards issued by the Comptroller General of the Unites States contain new language concerning external auditor independence. A question and answers summary from the California Society of Certified Public Accountants (CalCPA) states that, while independent CPAs can provide year-end journal entries (if approved by client), the organization's management must knowledgeably and meaningfully approve any entries created by the auditor. This guidance requires that its external auditors maintain a certain level of separation from MHDC's actual accounting function. The over-reliance poses a risk in that the MHDC's external auditors could decide that they lack independence to continue performing the MHDC external audit, which would require MHDC to go through a lengthy selection process to acquire a new firm and spend extensive staff time to orient the firm about the operations and finances of MHDC. Since there is a lack of knowledge at MHDC about its properties and transactions, as illustrated in their previous omission of information to the external auditors, this situation may be exacerbated if MHDC finds itself in a situation where they must select a new audit firm.

Auditors found a lack of comprehensive information in monthly reports that are prepared for MHDC's asset manager. This information gap makes it difficult for MHDC to adequately monitor its housing assets and make strategic decisions on the overall operation of its housing portfolio.

Regular information concerning MHDC's properties, including issues of safeguarding, maintenance, and financial condition is communicated by Caritas to MHDC's asset manager through the Property Manager's Monthly Report ("management report").

Caritas indicated to auditors that the management report is supposed to include monthly financial information, a cash disbursement journal, information on extraordinary expenses, a rent delinquency report, a tenant register, and any management, occupancy, maintenance or security issues that arose that month. As part of the report, MHDC's Asset Manager receives information about safety and maintenance, along with other demographic information, via the resident manager's report. The monthly management report, along with regular meetings of two asset management committees at MHDC's staff and Board level, are the main modes of communication about housing assets.

Audit staff sampled and reviewed monthly management reports of MHDC properties to determine if MHDC could effectively accomplish its role as property owner – one that includes strategically monitoring its housing assets – using the information provided in the monthly reports. Audit staff examined both the financial information contained in the management report, and the two narrative portions of the report, which included the cover memo and the resident manager report. Auditors found that the information included in reports did not provide MHDC a complete indication of the well being of its properties:

- *Reports do not adequately explain maintenance issues or maintenance costs.* Resident managers' reports include a section used to report maintenance issues, types, and reasons for pending requests for maintenance or repair. Most of the reports that were sampled listed the type of repair but did not describe what the repair consisted of, and it was not possible for the auditors to determine from this section of the report exactly what the maintenance issues were. For example, Caritas often reported that it completed several emergency repairs during the month, but these repairs were not explained nor the associated costs listed. In some cases, the operating statements that make up part of the monthly financial reporting mechanism indicated that a property was over budget in maintenance repair contract costs, however, the written portions of the report did not indicate the cause of the overrun and even indicated there were no maintenance issues to report for that month.

- *Reports do not provide sufficient information about planned maintenance costs and sources of payment.* Resident manager reports include space for resident managers to inform the asset manager at MHDC about any scheduled repairs for the following month, their estimated cost, and the source of payment—all pieces of information helpful to the owner of the properties in evaluating the overall health of its housing portfolio. However, most of the reports reviewed by audit staff did not adequately describe the major repair items scheduled for the following month. The majority of the reports that listed some type of scheduled upcoming repair did not list the estimated cost and did not provide the source of payment. For example, one report listed major maintenance items such as the replacement of bath and kitchen tiles in two apartments, as well as the painting of another. The estimated costs were not included, nor was the source of payment. Another report listed "water intrusion problem throughout property -- Owner is working on it" in the section for describing scheduled maintenance items for the upcoming month. However, the problem was not described in further detail, nor

was it clear from this description whether this was a planned maintenance repair or an emergency situation.

- *Reports are not a strong source of information concerning security incidents.* Security summaries in sampled reports provide space to report on the number of incident reports written or received, as well as a summary of the incidents and any other concerns. Many reports listed the incident reports written, but it is unclear from their description what took place and what actions were initiated by Caritas staff to prevent further occurrences. Although it is the responsibility of Caritas to manage the day-to-day aspects of properties, including safety and security of tenants and property, MHDC should have information available that allows it to take a strategic approach to safeguarding its assets. If ongoing reporting about specific incidents is not adequate, MHDC may not be aware of safety or safeguarding issues as they arise, and this could pose liability issues since ultimately, the owner (MHDC) is responsible to its tenants, funders, lenders, and limited partners.

Based on the analysis of the sample of monthly reports, auditors concluded that the management reports are not adequate channels of communication about maintenance issues, and they are only weak channels of communication about issues of safeguarding of assets. While financial documentation such as the operating statement shows budget versus actual income and expenses for the month, and the schedule of disbursements shows checks written for that month, bank statements are not currently provided to MHDC's asset manager that would support reconciling these documents. Best practice documentation provided to audit staff by Caritas indicates that bank statements should supplement monthly reporting information and that reports should include an explanation of unexpected expenses when they exist. Without adequate information, MHDC is unable to effectively plan for the overall upkeep of its buildings and gauge the estimated costs of repairs and maintenance. Items that will affect the overall budget and financial condition of the buildings are not fully explained in the monthly reports. Issues related to safeguarding of assets and tenants are listed in monthly reports, but sufficient details are not disclosed and require MHDC staff to request an incident report to obtain more details. MHDC confirmed the auditor's conclusion and stated that it is difficult to determine what repairs or maintenance were done, and that they cannot verify if the maintenance work took place simply from the information in the monthly reports. Although Caritas and MHDC also have an asset management committee to communicate about properties, MHDC should be able to rely on monthly written information to adequately monitor its housing assets and Caritas performance.

MHDC Does Not Take an Active Role in
Determining Information Needed to
Effectively Monitor its Assets

Property owners should take an active role in setting policies for asset management purposes and be able to monitor the performance of its property managers, setting up standards for the expectations of performance of its property managers early on. If the property owner does not have comprehensive knowledge about its properties, information

key to the viability of its housing stock might be overlooked. Audit staff found specific examples of information that has not been communicated to MHDC as part of Caritas' regular reporting duties. Although the management plans for each property do not require Caritas to submit these types of information to MHDC, these examples illustrate the need for MHDC to take a more active role in monitoring of its housing assets.

- MHDC has been unaware of certain loan advances between the operating accounts of certain properties. In September 2005, MHDC sent a memo to Caritas to inquire about advances or loans from the operating accounts of the scattered site properties made to MHDC affiliate properties. The memo requested that future draws be brought to the attention of the CEO of MHDC, with a copy to its asset manager in order to determine from where funds should be drawn and so that MHDC might have a clear picture of monies transferred between properties.

- Also in September 2005, MHDC's asset manager learned of a lawsuit settlement regarding the Apollo Development Corporation, the General Partner of the Apollo development. In this case, the MHDC asset manager was unaware of a lawsuit settlement regarding an MHDC property and learned of the issue through the limited partner.

- In addition to the information absent in the sampled reports, MHDC staff noted that regular provision of additional information from Caritas would be helpful in asset monitoring. MHDC staff informed the auditors that Caritas does not provide bank statements for each property as part of the regular reporting to MHDC. According to MHDC staff, bank statements would allow MHDC to monitor both its properties and Caritas, by allowing it to view the draws from various accounts and to examine their balances and maintain an ongoing view of the financial condition of its properties. However, according to Caritas' standard operating procedures and its management plans with MHDC, bank statements are not one of the elements of regular reporting to MHDC and financial information should be gleaned from the cash disbursement schedule included in monthly reports. However, in management agreements, bank statements are listed as an item to be provided to MHDC. Without this regular information, it is difficult for MHDC to exert control over Caritas as its property manager, or to effectively monitor its housing assets. MHDC, however, has not yet taken an active role in obtaining this information.

- MHDC lacks written policies and procedures for managing and monitoring its properties despite the complexity of loan and regulatory agreements of its properties. MHDC staff acknowledged the importance of developing policies and procedures but mentioned that they have not made a concerted effort to do so. MHDC has not taken an active role in developing their own set of policies and procedures due in part to an understaffed asset management division that currently has only one full-time staff member and a vacant director of asset management position.

The examples above indicate a need for MHDC to take a more proactive role in managing and monitoring its properties. Instead of being proactive by determining what information it needs to monitor its assets effectively, MHDC has been reactive, requesting additional information as needed. Caritas' responsibility is to manage the day-to-day operations of MHDC properties, but it is the responsibility of MHDC as the property owner to take a high-level monitoring approach.

Because MHDC has not taken an active role in setting broad-scope policies and procedures for the strategic monitoring of its housing assets, MHDC is putting itself, its tenants, and the City's investment in MHDC at risk. MHDC has exhibited a lack of knowledge about issues having an overall effect on its housing and issues such as the ones mentioned above may have negative consequences on the overall health of the organization, its housing stock, and the City's ability to rely on MHDC as an effective provider of affordable housing for residents of San Francisco. MHDC has increased its ability to develop housing by forming limited partnerships with external investors and using their investment as the primary source of capital. Ineffective monitoring, leading to properties with liability and financial difficulties, could cause Mission Housing's position as a good investment partner for these potential limited partners to suffer. In some cases, these investors, after researching organizations with which to partner, may choose other organizations on the basis of these liability and financial issues.

RECOMMENDATIONS:

1. MHDC should strengthen its asset management capacity by hiring and/or retaining enough sufficiently-skilled finance and asset management staff to track, analyze, and report on all of its operations, including those affiliate organizations over which it has control by virtue of controlling Board membership and the services of MHDC's wholly-owned subsidiary management company.

2. MHDC should finish implementing the recommendations communicated to it by its external auditors in their 2003 management letter regarding management of its housing assets.

3. MHDC should develop its own set of polices and procedures pertaining to managing and monitoring its properties. In doing so, MHDC should take a more active role in shaping the contents of monthly management reports of its properties in a manner that reflects its needs as asset manager, identifying the information it needs to effectively monitor its assets. Once it has determined what this information consists of, MHDC should ensure that Caritas is providing that information. This could involve changing management agreements for the properties or even the master agreement between Caritas and MHDC.

CHAPTER 3
MHDC NEEDS TO IMPROVE ITS CONTROLS OVER SERVICES TO ENSURE COMPLIANCE WITH LOAN AND REGULATORY AGREEMENTS AND ALSO NEEDS TO ESTABLISH A CLEAR AND CONSISTENT PURPOSE

CHAPTER SUMMARY

Mission Housing Development Corporation (MHDC) has built a mixture of affordable housing units since 1976 and has supplemented its housing sites with tenant services funded through a variety of sources. As the developer and owner of several different types of affordable housing units, MHDC has both provided tenant services through its own staff and coordinated service provision at its housing sites from other nonprofit service providers. Recent changes in management and staffing have led to a series of allegations about MHDC as an organization and what its proper role should be as an affordable housing provider. This chapter details the changes that have occurred in service provision with the purpose of presenting the facts about service requirements and service changes. The audit report does not make conclusions about what Mission Housing's role should be in the community. Rather, the purpose of this chapter is to clarify what services are available at MHDC sites and its funding sources and detail the relationship between funding for housing and funding for services. The discussion of services in this chapter deals exclusively with tenant services and excludes the property management services, such as janitorial and maintenance work, that is conducted by Caritas at MHDC properties.

FINDING 3A. MHDC LACKS CLEAR AND COMPREHENSIVE KNOWLEDGE OF ALL TENANT SERVICES AVAILABLE AT ITS SITES AND THE SERVICE REQUIREMENTS OUTLINED IN LOAN AND REGULATORY AGREEMENTS. THE ORGANIZATION IS AT RISK OF NONCOMPLIANCE WITH FINANCING TERMS AND PROGRAM REGULATIONS.

After a series of meetings with MHDC staff, it became apparent that MHDC lacks a comprehensive listing of all services provided at its housing sites that would allow it to fully understand and manage the tenant services. Audit staff constructed the listing of services available at MHDC sites (shown in Appendix A) using multiple interviews with MHDC management and staff and a variety of sometimes conflicting information. The organization also lacks a written and agreed upon understanding of how services coordinators work because the services coordinators themselves have varying understandings of their responsibilities and are not aware of all the services they are supposed to provide compared to management's understanding. MHDC also lacks written agreements with some nonprofits that are providing services at MHDC sites, and the organization is exposed to unnecessary liability due to the lack of these types of agreements. As a result of these gaps of information and clarity, some tenant services are

not available consistently and MHDC may have difficulty measuring the success or failure of its service provision.

MHDC also lacks a clear understanding of the relationship between funding for affordable housing development and service provision. Much of the funding that MHDC has obtained for affordable housing development requires that MHDC make available certain forms of tenant services at its sites. However, MHDC does not have a comprehensive listing of service requirements for its sites and is at risk of non-compliance with loan and regulatory agreements. Without a comprehensive listing of services at MHDC sites and service requirements, MHDC cannot guarantee that the services it has made available at each site comply with loan and regulatory agreements or with the purpose and reason behind why investors or funders selected MHDC as the developer and owner of certain properties. This risk has been exacerbated recently as the organization has lost staff and restructured the manner in which it provides tenant services.

Comprehensive Listing of
Services at MHDC Sites
Not Available

A reasonable expectation of a housing organization that provides services to its tenants is that the organization would have a centralized listing of services provided or that the organization could compile a listing of information that would allow one to determine all services provided. A listing would allow MHDC to track services and use the information for resource allocation decisions and to affirmatively ensure compliance with the service mandates of regulatory and loan agreements. A listing would also allow services coordinators to access the information of services available at all sites and use the information to coordinate service delivery for tenants. Service coordinators could use the listing to identify what services each of the coordinators has brought on site and leverage the efforts and relationships of other services coordinators to make the services available at more sites.

After a series of efforts, it became clear that the information was, at the least, not available in written form. As a result of the lack of centralized information, the audit team interviewed MHDC management and later contacted each services coordinator to inquire about the services provided at MHDC sites. Through these interviews, the audit team generated the centralized listing of services available at each site that is attached as Appendix A.

Lack of Clarity About Services Available
Between Management and Staff

In creating a listing of services at MHDC sites, the auditors determined that there was a lack of clarity between MHDC management and the services coordinators regarding the services actually being provided at the various sites. Service coordinators did not indicate some of the services that they provided and MHDC management provided inaccurate information about services being provided by the services coordinators. Some

of the instances that demonstrated this lack of clarity and consistency in understanding include:

- MHDC management indicated that one of the services coordinators provided services at Colosimo, but the services coordinator stated that she did not provide services for that site.

- MHDC management indicated that one services coordinator provided services for the scattered sites, but the services coordinator stated that she was available for those tenants, but did not go to the locations, and that the access to services for tenants at scattered sites is not communicated effectively to tenants at the scattered sites.

- Every services coordinator provides information and referral services to tenants, but the elements of information and referral differ depending on the site and the services coordinator. MHDC management was unable to provide a listing of those differences and there was some indication that management and staff's understanding differed.

Part of the reason for this lack of clarity is that MHDC does not have written descriptions of the specific services that each services coordinator is supposed to provide. MHDC management understands that it has two services coordinators who specialize in family and youth services, a services coordinator who specializes in senior services, a services coordinator who specializes in case management for seniors, and three services coordinators whose funding comes, in part, from the Integrated Services Network (ISN) grant received through the Human Services Agency (HSA). However, the most recent job descriptions provided by MHDC are identical and do not reflect these differences. Although the fact that MHDC has generic job descriptions for its services coordinators is not problematic in and of itself, MHDC lacks any formal and written expectations that illustrate to management and staff how the jobs of the services coordinators differ. Due to the lack of clear written direction of the expectations and differences in services coordinator duties, staff's understanding of services differs from management's.

Also, the stated differences in duties and responsibilities entail different skill sets and knowledge for the services coordinators. The skills and responsibilities of a services coordinator who focuses on senior services will likely differ from a services coordinator who deals with family and youth services or a services coordinator who deals with tenants in SROs. For example, information and referral for seniors will probably focus more heavily on providing access to transportation, and assistance with the geriatric aspects of mental health services, medical coordination, physical health, nutrition, and assistance with independent living issues. In contrast, the tenants living in MHDC SROs will probably need help with supportive services that promote stabilization of tenants in housing and prevent future episodes of homelessness. Services for families and youth will also differ in focus from services provided to seniors and adults living in SROs. Although there will likely be overlap in service needs, services coordinators should have documented roles that link their skills and experience with the services they are providing. Service coordinators indicated that their focus varied even though their job

descriptions were the same. For example, two services coordinators who work at the senior sites indicated that they have different roles at those sites. One coordinator said that she does not provide paperwork assistance and "works more generally" with tenants, where the other coordinator indicated that he provides paperwork assistance and "works more one-on-one with tenants."

Audit staff reviewed job descriptions provided by the director of human resources, the human resource files, and from the services coordinators personnel files and found that most of them did not match. Regardless of which job description was examined, none of them reflected all the differences communicated by the services coordinators and by management. If management assigns services coordinators according to the populations that they serve (i.e., seniors, families, or SROs), it is a reasonable expectation that the job descriptions or other written documents would reflect those delineations. If management supports the use of generic job descriptions for the services coordinator positions, it should have an alternate means of documenting the differences in specific duties and skills required.

MHDC Does Not Have Written Agreements With
All Community-Based Organizations That Provide
Services at MHDC Sites

MHDC works with many other community-based organizations (CBOs) to provide services at MHDC sites. Several organizations have Memoranda of Understanding (MOUs) with MHDC for the services they provide at MHDC sites, including Baker Places, Inc., On Lok Senior Health Services, Centro Latino, University of San Francisco, Mission YMCA, and the Mexican Art Museum. For example, Baker Places, Inc. has an MOU with MHDC to provide on-site intensive case management services to residents at the Apollo Hotel, Altamont Hotel, and South Park Residences (which consists of the Park View and Madrid Hotels). The agreement between MHDC and Baker Places provides an example of how an MOU clarifies the roles and responsibilities of each organization. Under that MOU, intensive case managers conduct outreach to tenants with special needs; offer formal and informal case management; establish and update service plans for individual tenants; and lend support, advice, and education to all on-site staff in helping to prevent and intervene during crises. Similarly, Caritas' roles and responsibilities for property management are clearly defined in an MOU with MHDC. These specific details of roles and responsibilities allow MHDC to understand what services are being provided by external organizations and to evaluate whether the services are consistent with the agency's goals and objectives.

However, other organizations that provide services at MHDC sites do not have MOUs, such as New Haven Home Health Services, Inc., Bayview Barber College, and the Head Start Program. Without MOUs, MHDC is exposed to liability resulting from services provided at its sites by other organizations. In addition, without written documentation of the services that are being provided, MHDC might be unaware of the extent of services at its sites, which could lead to some overlap in services or in the provision of services that are inconsistent with the agency's goals and objectives.

Six MHDC properties each have two services coordinators assigned to provide or coordinate tenant services. It is likely that property size might explain the number of services coordinators necessary for a particular property. However, these properties were not any larger than other properties and are similar in type. For example, the Altamont Hotel (SRO hotel) has 89 units and two services coordinators, but the Apollo (SRO hotel) and South Park Residences (SRO hotels) have 81 and 85 units, respectively, and only one services coordinator each. Alcantara (senior housing), Dunleavy Plaza (multifamily housing), Esperanza (senior housing), and Abel Gonzalez (senior housing) each have 30 to 50 units and two services coordinators, but Rich Sorro (multifamily housing) has 100 units and no services coordinator on site. The services coordinator positions at Rich Sorro Commons were formerly funded through a Human Services Agency (HSA) grant, but MHDC could not secure continued funding as it scored too low in the RFP process during 2005. In addition, Del Carlo Court (multifamily housing) has 25 units and Colosimo (multifamily housing) has 11 units but neither of these sites has an on-site services coordinator.

The differences in duties that management identified verbally could be the reason for some of the overlap in assignment of services coordinators. As discussed earlier, these differences are not completely clear to the services coordinators and both services coordinators provide information and referral services to the tenants at each of the five sites mentioned above that had two services coordinators. For example, both services coordinators at the Altamont, Alcantara, Dunleavy Plaza, Esperanza, and Abel Gonzalez sites provide workshop and socialization organization, conduct conferences with case managers, organize monthly tenant meetings, and provide translation.

The audit team also observed some potential overlap between services that nonprofits provide at MHDC sites. For example, Centro Latino provides case management services to residents at senior buildings, but MHDC has an assigned services coordinator at senior buildings who provides similar case management services. The YMCA and On Lok Senior Health Services both provide blood pressure and glucose screening at both Alcantara and Abel Gonzalez. In addition, Centro Latino and ADA paratransit both provide transportation services to the elderly and disabled at Alcantara, Dunleavy Plaza, Esperanza, and Abel Gonzalez Apartments. Although some of the duplicate services might be necessary based on demand, it is difficult to measure the duplication without a comprehensive listing all of the services provided at each location.

Two examples also indicate that there may be gaps in services. At Bayview Commons, which was developed with funding from Housing Opportunities for Persons With AIDS (HOPWA), MHDC management does not know how services directed at the HOPWA population were being provided. The second example was in the case of a services coordinator who assumed that people who needed AIDS-related services were getting them from another service provider. Because MHDC did not have a complete listing of the services provided at each of its sites, it cannot adequately identify overlap and gaps in service and cannot ensure that it is providing services or making services available for all its tenants.

Without a Clear and Comprehensive
Understanding of Services Provided
At its Sites, MHDC Cannot Ensure That
It is Complying With the Regulatory and
Loan Requirements for Service Provision

Some of the City funding to develop and preserve affordable housing was granted to
MHDC within the context of a model that involves service provision along with
affordable housing. In fact, many of the contracts and grants provided to MHDC for the
provision of services reference that model. For example:

- The Home Investment Partnership Program (HOME) contract that MHDC had
  through the Mayor's Office of Housing (MOH) requires that MHDC be a
  Community Housing Development Organization (CHDO). Some of the
  requirements for being considered a CHDO include having a history of serving
  the community within which housing to be assisted with HOME funds is to be
  located.

- The Community Development Block Grant (CDBG) contract administered
  through MOH states that the City is authorized to distribute CDGB funds to
  certain neighborhood-based nonprofit corporations for the specific and special
  purpose of achieving the goals of the City's Community Development Program.
  This program entails a mixture of funding for housing and services.

- One of the HSA contracts that MHDC had with the City to provide services at
  Rich Sorro/Mission Bay was partially funded by the State's Supportive Housing
  Initiative Act (SHIA). SHIA contracts are designed to help tenants retain their
  housing, improve their health status, and maximize their ability to live and work
  in the community.

In addition, specific loan requirements from the City mention the relationship between
building affordable housing and providing services for tenants in order to stabilize the
community and allow formerly homeless adults and families who are below the average
median income an opportunity to thrive and sustain their housing. Audit staff examined
the loan and regulatory requirements for two properties, Rich Sorro (Mission Bay) and
the Apollo, to determine if the provision of services was an ancillary part of the funding
given for housing development or if services were mentioned. Many of the loan and
regulatory requirements mentioned the provision of services:

- MHDC received a HOPWA capital loan for $1,000,000 for Rich Sorro Commons
  and a HOPWA capital loan from the Redevelopment Agency of the City and
  County of San Francisco for $480,000 for the Apollo. The loans requires that
  residents or clients residing in HOPWA units have access to appropriate case
  management, psychological supportive services and other support services, as
  well as to healthcare, where required. MHDC was to use its best efforts to locate
  a care provider who could appropriately care for the individual and refer the
  individual to the care provider. Despite the requirement, MHDC no longer has an

on-site services coordinator at Rich Sorro and the site does not have case management, psychological supportive services and other support services on site.

- MHDC (Rich Sorro) applied for and secured a $500,000 Affordable Housing Program loan from the Federal Home Loan Bank through Citibank. The manner in which the application was scored demonstrates that the project would offer services and opportunities that empower residents to improve their own living conditions. The application stated that in order for the three or more bedroom units to qualify for points in the Special Needs category, the project must include features that specifically serve the needs of children and youth, such as on-site daycare, after-school programs, and educational enrichment. MHDC's application stated that "in order to create a truly supportive environment for large families, the site was to feature 1) the Home Link Mentor Program, 2) on-site child-care, and 3) MHDC resident Programs."

- MHDC (Apollo) has a Housing Assistance Payments (HAP) contract with HUD through the San Francisco Housing Authority with the purpose of providing Section 8 rental assistance for homeless individuals in rehabilitated SRO housing. The HUD contract requires MHDC to make a good faith effort, as defined by the regulations, to provide training, employment, and business opportunities for lower income-persons.

- The Composite Regulations for the HOPWA Program require that all grantees providing housing ensure that qualified service providers in the area make available supportive services to the individuals assisted with housing and provide for locating a care provider who can appropriately care for the individual and refer the individual to the care provider.

MHDC must provide services to tenants of its housing developments as a condition of the funding received under many of its contracts, grants, loans, and regulatory agreements. Although these regulatory agreements discuss the provision of services to secure financing for housing development, the regulatory agreements examined by audit staff did not indicate how MHDC must go about providing those services. The service delivery method currently used by MHDC (i.e., providing services through its services coordinators or through other CBOs) complies with the requirements that MHDC put forth its best efforts to provide services. However, in the case of Rich Sorro, it is unclear whether MHDC is complying with the service provision requirements because a services coordinator is no longer on site and the Homelink Mentor Program is no longer available. Additionally, MHDC management's opinion that MHDC is not in the business of services illustrates the lack of understanding of the reason why the City and other governmental agencies have chosen to provide funding to MHDC for affordable housing development and preservation.

Some of the communication between MHDC staff and management indicated that MHDC is partly aware of requirements that call for service provision as a condition of funding for development. For example, the Bayview Commons development was funded in part through HOPWA funding, and MHDC staff have indicated that they are required

to have some sort of program to provide services on site. In this case, MHDC staff indicated that the San Francisco Housing Development Corporation (SFHDC) provides services by having a full-time services coordinator on site. However, as mentioned earlier, Rich Sorro Commons was also funded in part through HOPWA funding but no longer has a services coordinator on site. Similarly, documentation obtained by the auditors shows staff communicating to management that MHDC could not operate their SRO buildings without services, not only because the regulatory agreements require them, but also because they improve tenant stabilization and quality of life for residents. Management of an organization that has regulatory requirements to provide services should have full documentation of all those requirements. MHDC has not taken steps, such as creating a comprehensive listing of services required and provided at its sites, to ensure that it is in compliance with the complex requirements outlined in its loan and regulatory agreements.

Not understanding the service requirements puts the organization at risk of not being in compliance with its financing terms and losing funding for housing development. It also poses a threat to the organization in terms of its being a strong candidate for future funding. Some organizations mitigate against this threat by organizing service provision and housing development under two separate affiliate organizations. A brief review revealed that one organization has a nonprofit affiliate that provides both property management and supportive services. Another organization has an affiliate in which the housing organization's executive director is the same as the affiliate providing services. A similar structure could clarify MHDC's purpose of being a housing developer, while allowing MHDC to continue to provide services at the sites that are required to have those services under their loan terms. In addition, a similar structure could clarify financial statements, allowing investors and funders to understand fiscal solvency quickly and accurately. Finally, it could clarify the relationship between services and housing for MHDC so that the cost of services would be reflected by the amounts charged by the affiliate to provide services. It would be necessary to research in-depth the proper affiliate structure and relationship to MHDC that would maximize these benefits for MHDC.

It Is not Clear That Service Provision
Has Drained MHDC Resources

MHDC management has stated that MHDC was subsidizing City programs and that service contracts with the City were draining the agency's reserves because the agency's funding was being used to pay for services. MHDC management also stated that this situation impacted the organization's cash flow as cash was being diverted to services instead of the buildings. Based on the information available to MHDC about its properties and costs, MHDC could not in fact determine that services were draining the agency's resources. MHDC was unable to produce financial reports or budgets for 2004 and 2005 to present to the Board of Directors in November of 2004. MHDC staff brought in outside consultants to determine the financial status of the organization. One of the consultants presented information to the Board of Directors in March 2005 indicating that MHDC had experienced a loss from operations of $363,775 and that one of the primary causes was that the cost to provide MHDC programs to residents exceeded

the cost of funding for those programs. Audit staff later learned that the information presented to the Board by the consultant did not agree with the draft of MHDC's financial statements prepared by MHDC's external auditors. The external auditors' draft 2004 consolidated financial statements actually show that MHDC did not have a deficit of $363,775 but rather realized net income of $1,026,835. If that net income figure is reduced by the amount of a gain on sale of a partnership interest that occurred in 2004, the financial statements still show net income from operations of $191,651. These details are raised to illustrate that the determination that MHDC resident programs were draining the agency's resources was not completely accurate.

The cost of service provision is part of the overall cost of running the organization, but there are other factors that influence the organization's financial resources. Some of the alleged cost overruns that MHDC experienced can be attributed to other factors occurring at the time. The MHDC consultant stated in his report that another reason for the loss from operations was the cost associated with MHDC defending itself from "external" attacks. For example, MHDC had a lawsuit from a former Board member and paid off a settlement to a former employee because of a labor dispute. Other external factors include the ability of the organization to collect rent monies from tenants and the costs of operating buildings. One of the communications between MHDC staff and the executive director indicated that some of the drains on MHDC resources might include the fact that:

- Rents are low and cannot be raised due to constraints of state subsidies.

- Commercial spaces are paying lower rent than in the past because of the downturn in the economy. Rents were renegotiated in order to avoid losing them entirely.

MHDC's conclusion that services were draining the agency's resources is also not completely accurate because the City contracts with MHDC were never intended to fully cover the cost of providing services. The contracts only covered a portion of the staff positions and each contract expected a matching contribution by MHDC. This is a standard occurrence in the nonprofit industry and in the manner the City distributes funding to nonprofits, as organizations providing funding often require that the nonprofit either use some of its general funds to match the contribution or require that the organization obtain funding from other sources. Examples of that expectation in MHDC's contracts with the City are illustrated below:

- The CDBG contract for $360,000 that MHDC held with MOH states that MHDC would affirmatively seek non-CDBG funding sources to fund operating costs and costs overruns of the project, to assure continuity and eligibility of the project, and to provide regular maintenance and repair to any facility or equipment. The contract's budget shows that the $360,000 from the CDBG was supposed to be supported by an estimated $371,147 of other funding.

- The HOME contract for $50,000 that MHDC held with MOH showed that these funds would be used to fund part of the salaries of two tenant coordinators and that the $50,000 would be supplemented by a HSA grant of $16,831 and $48,170 from the Altamont Hotel Associates Operations.

- The most recent Integrated Services Network ISN grant that MHDC has with HSA shows that the total supportive services operating costs for the term of January 2003 to January 2006 was $767,388 and that the HSA (through HUD funds) portion only covered $198,540 of that amount.

RECOMMENDATIONS:

4. MHDC should create a listing or use the listing developed during the audit process of all services provided and available at each housing site, including who provides the service and the sources of funding for the positions or service.

5. MHDC should develop a formal, written and agreed upon system to communicate the specific roles and responsibilities of the services coordinators. One way of achieving this is by updating job descriptions so that each services coordinator has clear definitions of the specific roles and responsibilities involved in their positions. Alternatively, MHDC could provide clarity by putting together written expectations of the specific services provided, locations, and duties of each services coordinator. Such a listing should be made available to both management and staff so that there is a clear and consistent understanding of the services and roles provided by each of the services coordinators.

6. MHDC should develop a listing of the loan and regulatory requirements for service provision for each of its properties. Used in conjunction with the previously mentioned listing of services available at its sites, MHDC would be able to affirmatively ensure compliance with the service mandates of regulatory and loan agreements.

7. MHDC should enter into MOUs or other appropriate agreements with all entities that provide services at its sites.

8. MHDC should explore the possibility of establishing a nonprofit affiliate that would manage services at MHDC sites in the same structural capacity that Caritas manages MHDC properties - with shared Board members, a separate executive officer, and specific work to be accomplished.

FINDING 3B. MHDC TENANTS STILL HAVE SERVICES AVAILABLE TO THEM ALTHOUGH FUNDING FOR SERVICES HAS DECREASED. MHDC LACKS A CLEAR AND CONSISTENT APPROACH TO TENANT SERVICES.

Some of the allegations that have been made against MHDC stated that MHDC had gutted services and that many residents now receive minimal to no services and programs. A review of the current organization of MHDC services found that although MHDC does not have a comprehensive knowledge of all services provided at its housing sites (Finding 3A), many services are still available to MHDC tenants. Although MHDC has moved to a model of service coordination rather than direct service provision, MHDC still provides many direct services.

In order to determine whether the services available to tenants have changed over the last few years, one must have a complete understanding of the tenant services available at MHDC sites. As discussed in Finding 3A, the auditors constructed a comprehensive listing of all services available at MHDC sites. After determining all the services currently provided at MHDC sites and the parties responsible for providing those services, the auditors were able to develop an understanding of the organization, its provision of services, and the parties responsible for providing those services.

Loss of City Funding

The auditors examined City contracts and grants from the year 2000 to the present and determined that MHDC received an estimated total of $2.5 million in City contracts and grants for service provision over that period. These grants and contracts included services such as facilitating transition from homelessness and transitional shelters to stabilized housing, economic and vocational development, mental and physical health, tenant empowerment and social integration, and education and outreach. Based on a review of contracts, the auditors estimated that MHDC no longer receives an estimated $679,000 a year. Appendix C illustrates all the City contracts and grants that MHDC has held with the City since 2000, including funding for development with the exception of loans and bonds. The table below briefly summarizes those contracts and grants.

Contract	City Department	Current Status	Last Contract (annualized estimate)	Purpose
ISN Grant	HSA	Funded	$67,834	Tenant services at MHDC sites
South Park	HSA	Funded	$77,376	Tenant services at MHDC sites
Rich Sorro	HSA	Not Funded	$189,215	Tenant services at MHDC sites
Citywide Families in SRO Collaborative	DPH	Not Funded	$20,758	Tenant services at non-MHDC sites
Mission SRO Collaborative	DPH	Not Funded	$114,504	SRO fire prevention and stabilization at non-MHDC SROs
Tobacco-Free Project 1	DPH	Not Funded	$155,000	Tobacco free policies and education at MHDC and non-MHDC sites
Tobacco-Free Project 2	DPH	Not Funded	$150,000	Tobacco free policies and education at MHDC and non-MHDC sites
HOME Funds	MOH	Not Funded	$50,000	Tenant services at MHDC sites
CDBG	MOH	Not Funded	$360,000	No services; funded construction, housing technical assistance and rehabilitation, asset management, and site feasibility activities.
TOTAL CONTRACTS NO LONGER HELD			$1,039,477	
TOTAL CONTRACTS NO LONGER HELD FOR SERVICE PROVISION			$679,477	

Table 4

The reasons why MHDC no longer receives funding for the contracts and grants listed above vary. For example, the Mission SRO Collaborative and the Citywide Families in SRO Collaborative for which MHDC received funding through DPH were to provide services at non-MHDC SROs. MHDC chose to not participate in either of the collaboratives and pulled out of these two contracts. MHDC staff stated that they chose to concentrate on service coordination for residents of MHDC SROs and their other supportive housing units.

MHDC submitted a bid to renew the contract administered through HSA for tenant services at Rich Sorro Commons. MHDC requested $70,800 to cover salaries and operational costs of the program. However, MHDC was not selected to renew the contract because its proposal did not receive the minimum points required for funding. MHDC appealed the decision but was not selected to receive funding.

Another contract that MHDC no longer has is the HOME Investment Partnership Agreement (HOME) contract administered through MOH. The funding has been granted to MHDC for some years and has usually been for $50,000 a year. MOH has not yet executed the 2004-2005 contract or provided funding for these services because it is still awaiting documents from MHDC.

In addition, even though MHDC was selected to receive two Tobacco Free contracts from DPH, MHDC was unable to finalize either of the contracts. DPH sent a letter in November 2004 telling MHDC that they were selected to receive $155,000 for a Tobacco Free Neighborhoods contract funded through Prop A and another $150,000 contract funded by Prop 99 for the Smoke-free Multiunit Housing project. The award letters indicated that that the only thing left was negotiation and development of an MOU to finalize the project description and budget. DPH sent a letter to MHDC in February 2005 offering new conditions to finalize the MOU for the tobacco free project. These provisions included going on a month-to-month contract and close scrutiny of the contract. The letter also mentioned that the budget was incomplete and submitted late and that the workplan had problems. According to the letter, "all of these delays and lack of follow-through appear to indicate the lack of staff resources and administrative capability on the part of MHDC to complete the work." MHDC responded that they could not comply with the month-to-month provision because they could not hire someone based on a month-to-month availability of funds.

One other contract that MHDC lost was the CDBG contract administered through MOH. The contract did not include funding for tenant services but rather included funding for multifamily and senior new construction, supportive housing technical assistance, single-family housing rehabilitation, asset management, and site feasibility activities. This contract included funding for staff salaries and benefits, but none of the funding was intended to be used for the salaries and benefits of staff involved with tenant service provision. The funding has been granted to MHDC for some years and has usually been for a total amount of $360,000 a year. Although $360,000 was reserved by MOH for MHDC for July 2004 through June 2005, MOH never executed the contract because the

Board of Supervisors froze the funding. MHDC was not selected for FY 05-06 and is not scheduled to receive any of the CDBG funds during FY 05-06.

The table below illustrates what each of the contracts paid for and the impact of not having those contracts. Note that in some cases, the services are still being provided either by other lead agencies or through different funding sources.

Contract	Paid for	Decrease in staff and services	Services available
Rich Sorro HSA Contract	Part of the salaries and expenses of the resident programs director, tenant coordinator, education coordinator, resource specialist and an MHDC garden coordinator.	Residents no longer have an on-site services coordinator and MHDC no longer has an education coordinator, resource specialist, or an MHDC garden coordinator.	Residents can contact an MHDC services coordinator for assistance; however, the services coordinator is not on site. Services available include the Head Start Program and the After School Program. Services no longer available include Rich Sorro Food Pantry, Homelink Mentor Program, San Francisco Food Bank Food Pantry, and the Safeway Bread Donation.
MOH HOME Contract	Part of the MHDC services coordinator positions at Altamont and Apollo in addition to the HSA ISN Grant.	The Altamont still has two services coordinators, and the Apollo has only one services coordinator.	MHDC services coordinators provide similar services through coordination efforts. MHDC pays for services coordinator positions at Altamont and the Apollo through the HSA ISN grant and MHDC funding.
Tobacco-Free Project (Prop A Tobacco Master Settlement funds)	Provided MHDC with funding for 0.25 FTE of an MHDC Youth Community Health Organizing Project (YoCo-HOP) Coordinator and 0.25 FTE of the Resident Programs Associate Director.	The YoCo-HOP Coordinator and Resident Program Associate Director positions were eliminated.	Services available at sites as part of the information and referral services do not include specific smokeless tobacco free programs. The current services provided by MHDC services coordinators do not include advocating for smokeless tobacco free policies or include educating tenants about tobacco use or fire prevention at the SROs.

Contract	Paid for	Decrease in staff and services	Services available
Tobacco-Free Project (Smokeless Settlement-funded)	Provided MHDC with YoCo-HOP Coordinator and $2,280 of the Resident Programs Director.	The YoCo-HOP Coordinator position was eliminated and the Resident Program Director appears to have been restructured.	See above.
Citywide Families in SRO Collaborative	MHDC received approximately $64,000 from September 2002 to June 2005. The specific MHDC salaries and benefits funded by this contract included funding for 0.7 FTE of an MHDC Project Coordinator.	MHDC no longer has the Families in SRO Project Coordinator position.	Because MHDC was only one of many collaborators, the collaborative still provides services without MHDC involvement and the Coalition on Homeless took on the previous role of MHDC.
Mission SRO Collaborative	Provided MHDC with $80,400 for personnel expenses and $34,104 for operating expenses. The personnel funding included 1.0 FTE of an MHDC Mission SRO Collaborative Coordinator, 0.7 FTE of an MHDC SRO Community Advocate, and 0.3 FTE of an MHDC Director of Supportive Housing.	MHDC no longer has the Mission SRO Collaborative Coordinator, SRO Community Advocate, or Director of Supportive Housing.	The collaborative still provides services without MHDC involvement and the lead agency is now Tenderloin Housing Clinic.

Table 5

Services Available

Although MHDC no longer has six City contracts to provide services valued at $679,000, MHDC tenants still have services available to them. The reorganization that occurred under the executive director allegedly moved MHDC from being the direct service provider to the being a services coordinator. As a services coordinator, MHDC refers tenants to other nonprofits, and in some cases, brings services to MHDC sites through the partnerships with other organizations. MHDC has had varying levels of staff providing tenants services over time. MHDC organizational charts show that the following changes occurred to staffing focused on providing tenants services:

1998-2000	2000 to mid-2004	June 2005
• Community Development Director • Community Development Specialist • Tenant Coordinator	• Director of Resident Programs • Associate Director of Resident Programs • ISN Tenant Coordinator (South Park) • ISN Tenant Coordinator (Apollo) • ISN Tenant Coordinator (Altamont) Tenant Coordinator • Senior Services Coordinator • Tenant Coordinator • Tenant Coordinator • Youth Coordinator (Rich Sorro Commons) • Director of Supportive Housing • SRO Collaborative Coordinator • Families in SRO Project Coordinator • SRO Resource Specialist • Tenant & YoCo-HOP Coordinator • Education Coordinator • Site Coordinator/Resource Specialist (Rich Sorro Commons)	• Service Projects Manager • Resident Services Coordinator (SRO) • Resident Services Coordinator (ISN South Park) • Resident Services Coordinator (ISN South Park) • Resident Services Coordinator (Seniors) • Resident Services Coordinator (Seniors) • Resident Services Coordinator (Seniors) • Resident Services Coordinator (Families SRO) • Resident Services Coordinator • SRO Community Advocate
3 Positions	16 Positions	10 Positions

Table 6

Despite changes in staffing, MHDC currently has a total of 8 staff[6] responsible for the provision of services, whether through coordination of efforts or through the provision of direct services. MHDC also coordinates with other nonprofit service providers to provide services at MHDC sites and for MHDC tenants. A listing of all services provided at MHDC sites is included in Appendix A.

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[6] Although ten positions are listed in the June 2005 organizational chart, the auditors determined that MHDC currently has only eight services coordinator positions and one service projects manager.

The information below gives some examples of the services provided for MHDC tenants by other nonprofits and organizations.

- Baker Places provides intensive case management services at the Apollo, Altamont, and South Park SROs and the City provides funding for these services directly to Baker Places.

- Centro Latino and ADA Paratransit provide transportation services for seniors at Alcantara Court, Dunleavy Plaza, Abel Gonzalez Apartments, and Esperanza Apartments.

- Safeway provides a bread donation for Plaza del Sol, Alcantara Court, Esperanza Apartments, Dunleavy Plaza, Abel Gonzalez Apartments, Juan Pifarre Plaza, and South Park Residences.

- The San Francisco Food Bank delivers food on a weekly, biweekly or monthly basis to Altamont Hotel, Mariposa Gardens, Apollo Hotel, Alcantara Court, Dunleavy Plaza, Esperanza Apartments, Abel Gonzalez Apartments, and the South Park residences.

Impact of Changes

Although some of the services changed over the last few years, it is difficult to determine the impact of the changes in service delivery. As discussed in Finding 3A, MHDC could not provide a comprehensive listing of services available at its sites and did not have documentation about service provision in the past. Audit staff worked to compile this information in order to gauge the impact, but the information on service changes was not available. Many of the people involved in service provision at MHDC have worked for MHDC a relatively short period of time and do not have the institutional knowledge to provide the auditors with a narrative of changes in service. Although audit staff could not quantify the total changes and the impact on tenant services over the last few years, there are indications that some services are no longer present.

The most recent (July 1, 2004, through March 31, 2005) HSA monitoring report of the Rich Sorro contract shows that MHDC services coordinators were providing or facilitating educational events and workshops like a voter education meeting, a community relations forum, a homeownership workshop, and an early stages of business development workshop. Social and recreational events included activities during Halloween, Thanksgiving, Easter, Black History month and Chinese New Year celebration. Without an on-site services coordinator, it is difficult to surmise if all of these events are still taking place on an onward basis. However, other services that were available during this time period, including the Rich Sorro Food Pantry and the Safeway Bread Donation, are no longer available. The estimated impact of the loss of this contract, based on figures in the HSA monitoring report, is that 50 individuals no longer receive food from the SF Food Bank and 25 units no longer receive the bread donation on a monthly basis. Tenants at Rich Sorro and Plaza del Sol were affected by the loss of the Homelink Mentor Program, which was an after-school tutor program provided through a partnership between the University of San Francisco (USF) School of Education and

MHDC to provide tutoring and assistance with accessing training and higher education. USF pulled out of the contract in mid-2005.

Despite the loss of funding, reduction of on-site staff at MHDC sites, and some service discontinuation, e.g., Homelink Mentor Program and SF Food Bank availability at Rich Sorro, services are still available to MHDC tenants through the eight services coordinators at MHDC sites and through other nonprofit providers that provide services to MHDC tenants. However, because of the lack of awareness of the entire scope of services provided at MHDC sites, as was discussed in Finding 3A, MHDC has become susceptible to criticism as it has changed its service delivery method and lost some of its City funding. As a result, it appeared that the loss of City funding and staff reduction meant that the organization was no longer providing tenant services when the facts demonstrate that MHDC still provides or coordinates many services for its tenants.

Lack of Clear and
Consistent Approach

Even though MHDC continues to provide services for its tenants, it lacks a clear and consistent purpose and mission. According to MHDC management, the original mission of the organization did not include the provision of services, but MHDC became involved in providing tenant services over the years. Although staff were unable to verify the actual number of positions dedicated to services in the past, separate organizational charts from MHDC showed three positions dedicated to providing services from 1998-2000, 16 positions from 2000 to mid-2004, and 10 positions in June 2005 (see table 6).

Audit staff attempted to determine if the mission and purpose of the organization had changed but instead determined that the MHDC mission statement and purpose is not consistently defined. Some of the mission statements examined included the provision of services as central to the purpose of the organization while others focused on creating affordable housing. For example, the mission statement published in MHDC's Twentieth Year Report in 1991 does not indicate that the provision of services is part of MHDC's mission. In contrast, the most recent articles of incorporation submitted to the Secretary of State in 1987 mention the provision of services as a specific purpose of the organization. Other statements targeted both low- and moderate-income people while others only mention low-income residents. For example, the mission statement posted on the MHDC website focuses on affordable housing for low- and moderate-income people. In contrast, the mission of the organization included in a recent a request for proposal to the Mayor's Office of Community Development does not include "moderate-income people". Finally, some of the documents examined focused specifically on residents of the Mission District while others mentioned other low-income communities in San Francisco.

Shifts in the mission and purpose of an organization are not problematic in and of itself, as many nonprofit organizations grow, develop, and expand their scopes. However, the City should expect that the mission and purpose of any organization it is funding be clearly defined and that changes to the purpose of the organization be documented and made official. Another expectation is that the mission of the organization as identified in the organization's bylaws be consistent with the mission that is identified in grant and

contract applications. Finally, another expectation is that the officers, Board members and MHDC staff have a consistent document that details what fits within the scope of the organization's mission and what is in addition to and not within the primary purpose of the organization.

The lack of a clear and consistent purpose over time may have been caused by the lack of documentation and formalization of changes in the mission and purpose of the organization as the organization has grown and developed. As MHDC developed more affordable housing and began to provide more tenant services over the years, consensus over the mission and purpose of the organization appears to have become an issue as different parties have begun laying claim on what the actual purpose of the organization had become. However, because a listing of service provision over time is not available and any changes to the mission statement over time have not been well documented, it is difficult to determine what the specific purpose of the organization is today. The lack of a clear and defined mission statement and the inconsistency of purpose has left the organization open to criticism regarding its decisions concerning services and housing development and has contributed to conflict within the Board of Directors, MHDC staff, and other community interests.

RECOMMENDATIONS:

9. MHDC Board of Directors and management should clarify the mission and purpose of the organization and ensure that all internal reports and documents; the articles of incorporation; grant, contract, and loan agreements; as well as external information such as the MHDC website, have a consistent purpose and mission.

Staff: Pablo Federico, Performance Audit Manager
        Deborah Gordon, Financial Audit Manager
        Catherine McGuire, Associate Performance Auditor
        Mina Yaroslavsky, Associate Performance Auditor

Service Name	Location	Who provides service	MOU?	Currently Providing?
Information and Referral (Bayview Commons)	Bayview Common ervices	SFHDC service coordinator	NA	Currently providing
Information and Referral (Family)	Rich Sorr Common eferral	MHDC - no individual currently	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Family)	Juan Pifa eferral	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Good Sar eferral	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Plaza del eferral	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Del Carlo eferral	MHDC - no individual currently	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Family)	Maria Alic eferral	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Family)	Mariposa eferral	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Colosimo eferral	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Family)	Betel Apar eferral	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Scattered Sites)	24th Stree 2786 eferral	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	23rd Stree 3021 eferral	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Information and Referral (Bayview Commons)	Bayview Commons	Multi-Family	Yes	San Francisco Housing Development Corporation	SFHDC staff indicated that they provide a basic set of services (as defined in the Definition of Terms worksheet).	SFHDC service coordinator	NA	Currently providing
Information and Referral (Family)	Rich Sorro Commons	Multi-Family	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC - no individual currently	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Family)	Juan Pifarre Plaza	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Good Samaritan	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Plaza del Sol	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Del Carlo Court	Multi-Family	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC - no individual currently	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Family)	Maria Alicia	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Family)	Mariposa Gardens	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Colosimo	Multi-Family	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Family)	Betel Apartments	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Scattered Sites)	24th Street, 2782-2786	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	23rd Street, 3019-3021	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices

Service Name	Location	Who provides service	MOU?	Currently Providing?
Information and Referral (Scattered Sites)	23rd Street, 3029	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Lily Street, 440	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	16th Street	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Moss Street, 74	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Capp Street, 896	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	18th Street	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Bryant Street, 2800-2818	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	15th Street	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Rondel Place, 69	site vacant	NA	site vacant
Information and Referral (Senior)	Dunleavy P	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Senior)	Dunleavy P	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (Senior)	Alcantara C	MHDC Services Coordinator 1	NA	Currently providing

Appendix A - Services Available at MHDC Sites
(Information and Referral Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Information and Referral (Scattered Sites)	23rd Street, 3025-3029	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Lily Street, 426-440	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	16th Street, 2945	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Moss Street, 70-74	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Capp Street, 890-896	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	18th Street, 3434	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Bryant Street, 2800-2818	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	15th Street, 1637	Scattered site for seniors and families	No	MHDC only. No outside funding for services coordinator positions	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing - Tenants must access service at MHDC offices
Information and Referral (Scattered Sites)	Rondel Place, 67-69	Scattered site for seniors and families	No	site vacant	site vacant	site vacant	NA	site vacant
Information and Referral (Senior)	Dunleavy Plaza	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Senior)	Dunleavy Plaza	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (Senior)	Alcantara Court	Senior	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 1	NA	Currently providing

Service Name	Location	Who provides service	MOU?	Currently Providing?
Information and Referral (Senior)	Alcantara	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (Senior)	Abel Gonz Apartments	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Senior)	Abel Gonz Apartments	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (Senior)	Esperanza Apartments	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Senior)	Esperanza Apartments	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (SRO)	Apollo Hot	MHDC Services Coordinator	NA	Currently providing
Information and Referral (SRO)	Altamont H	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (SRO)	Altamont H	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (SRO)	Hotel Dolor	site vacant	NA	site vacant
Information and Referral (SRO)	South Park Residences View and M Hotels)	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Maria Alicia	MHDC Services Coordinator 2	NA	Currently providing

Appendix A - Services Available at MHDC Sites
(Information and Referral Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Information and Referral (Senior)	Alcantara Court	Senior	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (Senior)	Abel Gonzalez Apartments	Senior	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Senior)	Abel Gonzalez Apartments	Senior	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (Senior)	Esperanza Apartments	Senior	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (Senior)	Esperanza Apartments	Senior	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (SRO)	Apollo Hotel	SRO	Yes	MHDC and City - both provide funding for the services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (SRO)	Altamont Hotel	SRO	Yes	MHDC and City - both provide funding for the services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 1	NA	Currently providing
Information and Referral (SRO)	Altamont Hotel	SRO	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 2	NA	Currently providing
Information and Referral (SRO)	Hotel Dolores	SRO	No	site vacant	site vacant	site vacant	NA	site vacant
Information and Referral (SRO)	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	MHDC and City - both provide funding for the services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator	NA	Currently providing
Information and Referral (Family)	Maria Alicia	Multi-Family	Yes	MHDC only. No outside funding for services coordinator position	Services coordinator provides a set of basic services (as defined in the Definition of Terms worksheet), including referral to other organizations that can assist a resident.	MHDC Services Coordinator 2	NA	Currently providing

Service Name	Location	Who provides service	MOU?	Currently Providing?
Case management	Esperanz Apartmer mental trition	Centro Latino	Yes	Currently providing
Case management	Alcantara mental trition	Centro Latino	Yes	Currently providing
Case management	Abel Gon Apartmer mental trition	Centro Latino	Yes	Currently providing
Intensive Case Management	Apollo Hc trying phone are	Baker Places	Yes	Currently providing
Intensive Case Management	Altamont trying phone are	Baker Places	Yes	Currently providing
Intensive Case Management	South Pai Residenc View and Hotels) trying phone are	Baker Places	Yes	Currently providing

Appendix A - Services Available at MHDC Sites
(Case Management Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Case management	Esperanza Apartments	Senior	Yes	Not funded by MHDC.	Centro Latino comes in and provides geriatric aspects of mental health services, medical coordination, physical health, nutrition and assistance with independent living issues.	Centro Latino	Yes	Currently providing
Case management	Alcantara Court	Senior	Yes	Not funded by MHDC.	Centro Latino comes in and provides geriatric aspects of mental health services, medical coordination, physical health, nutrition and assistance with independent living issues.	Centro Latino	Yes	Currently providing
Case management	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Centro Latino comes in and provides geriatric aspects of mental health services, medical coordination, physical health, nutrition and assistance with independent living issues.	Centro Latino	Yes	Currently providing
Intensive Case Management	Apollo Hotel	SRO	Yes	Not funded by MHDC. Baker Places receives City funding to provide services	Case management involves clinical work - if the tenant is trying to get into a service program, the case manager makes phone calls and sets up the tenant with the service. The case manager also follows-up with tenants to ensure that they are maintaining participation in the program.	Baker Places	Yes	Currently providing
Intensive Case Management	Altamont Hotel	SRO	Yes	Not funded by MHDC. Baker Places receives City funding to provide services	Case management involves clinical work - if the tenant is trying to get into a service program, the case manager makes phone calls and sets up the tenant with the service. The case manager also follows-up with tenants to ensure that they are maintaining participation in the program.	Baker Places	Yes	Currently providing
Intensive Case Management	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	Not funded by MHDC. Baker Places receives City funding to provide services	Case management involves clinical work - if the tenant is trying to get into a service program, the case manager makes phone calls and sets up the tenant with the service. The case manager also follows-up with tenants to ensure that they are maintaining participation in the program.	Baker Places	Yes	Currently providing

Service Name	Location	Who provides service	MOU?	Currently Providing?
Bread donation	Plaza de... ding. o the	Safeway and MHDC staff	No	Currently providing
Bread donation	Alcantara ... o the	Safeway and MHDC staff	No	Currently providing
Bread donation	Esperanz Apartmer ding. o the	Safeway and MHDC staff	No	Currently providing
Bread donation	Dunleavy lding. o the	Safeway and MHDC staff	No	Currently providing
Bread donation	Abel Gon Apartmer lding. o the	Safeway and MHDC staff	No	Currently providing
Bread donation	Juan Pifa ... o the	Safeway and MHDC staff	No	Currently providing
Bread donation	South Pa Residenc View and Hotels) o the	Safeway and MHDC staff	No	Currently providing
Food delivered every other week	Altamont n and	San Francisco Food Bank and MHDC staff time	No	Currently providing
Food delivered every other week	Esperanz Apartmen ces culates	San Francisco Food Bank and MHDC staff	No	Currently providing
Food delivered every other week	Dunleavy ices culates	San Francisco Food Bank and MHDC staff	No	Currently providing
Food delivered every other week	Abel Gonz Apartmen ces culates	San Francisco Food Bank and MHDC staff	No	Currently providing
Food Pantry	Betel Apa teers	San Francisco Food Bank and MHDC staff	No	Currently providing

Appendix A - Services Available at MHDC Sites
(Nutrition Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Bread donation	Plaza del Sol	Multi-Family	Yes	Not funded by MHDC.	Once per month, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Bread donation	Alcantara Court	Senior	Yes	Not funded by MHDC.	Once a week, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Bread donation	Esperanza Apartments	Senior	Yes	Not funded by MHDC.	Every other week, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Bread donation	Dunleavy Plaza	Multi-Family	Yes	Not funded by MHDC.	Every other week, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Bread donation	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Every other week, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Bread donation	Juan Pifarre Plaza	Multi-Family	Yes	Not funded by MHDC.	Once a week, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Bread donation	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	Not funded by MHDC.	Once a week, bread is donated to tenants in this building. Services Coordinator picks up bread and returns with it to the site.	Safeway and MHDC staff	No	Currently providing
Food delivered every other week	Altamont Hotel	SRO	Yes	San Francisco Food Bank	Food is delivered every other week for use by tenants. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff time	No	Currently providing
Food delivered every other week	Esperanza Apartments	Senior	Yes	MHDC pays for food by the pound.	Food is delivered to the building every other week. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Food delivered every other week	Dunleavy Plaza	Multi-Family	Yes	MHDC pays for food by the pound.	Food is delivered to the building every other week. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Food delivered every other week	Abel Gonzalez Apartments	Senior	Yes	San Francisco Food Bank and MHDC - funded by MHDC out of building operations.	Food is delivered to the building every other week. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Food Pantry	Betel Apartments	Multi-Family	Yes	Funded by MHDC out of building operations.	Service coordinator goes to food bank to buy food, volunteers subdivide the food and residents pick up the food.	San Francisco Food Bank and MHDC staff	No	Currently providing

Service Name	Location	Who provides service	MOU?	Currently Providing?
Food Pantry	Juan Pifa... ng (...s site)	San Francisco Food Bank and MHDC staff	No	Currently providing
Food Pantry	South Pa... Residenc... View and... Hotels) (...try. If ...te ...culates)	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Altamont (then ...s and dried)	San Francisco Food Bank and MHDC staff time	No	Currently providing
Monthly food box	Apollo Ho... (then ...s and dried)	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Alcantara (then ...s and dried)	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Dunleavy (then ...s and dried)	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Esperanza Apartmen... (then ...s and dried)	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Abel Gonz... Apartmen... (then ...s and dried)	San Francisco Food Bank and MHDC staff	No	Currently providing

Appendix A - Services Available at MHDC Sites
(Nutrition Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Food Pantry	Juan Pifarre Plaza	Multi-Family	No	San Francisco Food Bank and MHDC - funded by MHDC out of building operations.	In lieu of food delivered by the food bank, residents at this site go to the San Francisco Food Bank to purchase food using funds from the building budget.	San Francisco Food Bank and MHDC staff	No	Currently providing
Food Pantry	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	San Francisco Food Bank	Services coordinator goes to food bank to stock food pantry. If a tenant needs food, they can get the food from the on-site pantry at a rate of 3 to 4 boxes per year, after which the coordinator helps them find food in other ways. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Altamont Hotel	SRO	Yes	San Francisco Food Bank	Residents sign up to receive food box, must qualify, and then food boxes are delivered monthly. The food is for seniors and includes staples such as pasta, cheeses, juice and other dried goods. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff time	No	Currently providing
Monthly food box	Apollo Hotel	SRO	Yes	San Francisco Food Bank	Residents sign up to receive food box, must qualify, and then food boxes are delivered monthly. The food is for seniors and includes staples such as pasta, cheeses, juice and other dried goods. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Alcantara Court	Senior	Yes	San Francisco Food Bank	Residents sign up to receive food box, must qualify, and then food boxes are delivered monthly. The food is for seniors and includes staples such as pasta, cheeses, juice and other dried goods. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Dunleavy Plaza	Multi-Family	Yes	San Francisco Food Bank	Residents sign up to receive food box, must qualify, and then food boxes are delivered monthly. The food is for seniors and includes staples such as pasta, cheeses, juice and other dried goods. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Esperanza Apartments	Senior	Yes	San Francisco Food Bank	Residents sign up to receive food box, must qualify, and then food boxes are delivered monthly. The food is for seniors and includes staples such as pasta, cheeses, juice and other dried goods. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Monthly food box	Abel Gonzalez Apartments	Senior	Yes	San Francisco Food Bank	Residents sign up to receive food box, must qualify, and then food boxes are delivered monthly. The food is for seniors and includes staples such as pasta, cheeses, juice and other dried goods. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing

Service Name	Location		Who provides service	MOU?	Currently Providing?
Weekly food delivered	Mariposa	culates	San Francisco Food Bank and MHDC staff time	No	Currently providing
Weekly food delivered	Dunleavy	culates	San Francisco Food Bank and MHDC staff	No	Currently providing
Weekly food delivered	Alcantara	ces culates	San Francisco Food Bank and MHDC staff	No	Currently providing
Weekly food delivered	Apollo H	ces culates	San Francisco Food Bank and MHDC staff	No	Currently providing
Weekly food delivered	South Pa Residenc View and Hotels)	ces lculates	San Francisco Food Bank and MHDC staff	No	Currently providing

Appendix A - Services Available at MHDC Sites
(Nutrition Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Weekly food delivered	Mariposa Gardens	Multi-Family	Yes	San Francisco Food Bank and MHDC - funded by MHDC.	Food is delivered to the building once a week. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff time	No	Currently providing
Weekly food delivered	Dunleavy Plaza	Multi-Family	Yes	San Francisco Food Bank and MHDC - funded by MHDC.	Food is delivered to the building once a week. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Weekly food delivered	Alcantara Court	Senior	Yes	San Francisco Food Bank and MHDC - funded by MHDC.	Food is delivered once a week for use by tenants. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Weekly food delivered	Apollo Hotel	SRO	Yes	San Francisco Food Bank	Food is delivered once a week for use by tenants. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing
Weekly food delivered	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	San Francisco Food Bank	Food is delivered once a week for use by tenants. Services coordinator schedules and organizes distribution and calculates quantities.	San Francisco Food Bank and MHDC staff	No	Currently providing

Service Name	Location	Who provides service	MOU?	Currently Providing?
Blood pressure and glucose screening	Alcantara	YMCA	Yes	Currently providing
Blood pressure and glucose screening	Abel Gon[...] Apartmen[...]	YMCA	Yes	Currently providing
Blood pressure and glucose screening	Esperanz[...] Apartmen[...]	On Lok	Yes	Currently providing
Blood pressure and glucose screening	Alcantara	On Lok	Yes	Currently providing
Blood pressure and glucose screening	Abel Gon[...] Apartmen[...]	On Lok	Yes	Currently providing
Home health services	Betel Apa[...]	MHDC Services Coordinator	NA	Currently providing
Home health services	South Pa[...] Residenc[...] View and [...] Hotels)	New Haven Home Health Services, Inc.	No	Currently providing
Physical health education	Alcantara	YMCA	Yes	Currently providing
Physical health education	Abel Gon[...] Apartmen[...]	YMCA	Yes	Currently providing

Appendix A - Services Available at MHDC Sites
(Health Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Blood pressure and glucose screening	Alcantara Court	Senior	Yes	Not funded by MHDC.	Nurses come in quarterly to do blood pressure testing and glucose screening - services coordinator tries to arrange as often as possible.	YMCA	Yes	Currently providing
Blood pressure and glucose screening	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Nurses come in quarterly to do blood pressure testing and glucose screening - services coordinator tries to arrange as often as possible.	YMCA	Yes	Currently providing
Blood pressure and glucose screening	Esperanza Apartments	Senior	Yes	Not funded by MHDC.	On Lok comes in monthly to provide blood pressure testing and glucose screening.	On Lok	Yes	Currently providing
Blood pressure and glucose screening	Alcantara Court	Senior	Yes	Not funded by MHDC.	On Lok comes in monthly to provide blood pressure testing and glucose screening.	On Lok	Yes	Currently providing
Blood pressure and glucose screening	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	On Lok comes in monthly to provide blood pressure testing and glucose screening.	On Lok	Yes	Currently providing
Home health services	Betel Apartments	Multi-Family	Yes	MHDC only. No outside funding for services coordinator positions	At this site, services coordinator visits tenants when necessary, such as after a surgery.	MHDC Services Coordinator	NA	Currently providing
Home health services	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	Not funded by MHDC.	At this site, home healthcare is provided if necessary for temporary purposes by New Haven Home Health Services, Inc.	New Haven Home Health Services, Inc.	No	Currently providing
Physical health education	Alcantara Court	Senior	Yes	Not funded by MHDC.	YMCA comes in quarterly to provide health education to tenants	YMCA	Yes	Currently providing
Physical health education	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	YMCA comes in quarterly to provide health education to tenants	YMCA	Yes	Currently providing

Service Name	Location	Who provides service	MOU?	Currently Providing?
After School Program	Rich Sorr Commons	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Mariposa	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Plaza del	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Betel Apa	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Good Sar	MHDC and Mexican Museum	Yes	Currently providing
Head Start Program	Rich Sorr Commons	Head Start	NA	Currently providing

Appendix A - Services Available at MHDC Sites
(Education Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
After School Program	Rich Sorro Commons	Multi-Family	Yes	Mexican Museum provides teacher. The Caritas Resident Manager provides access to the room and some on-site coordination for the program.	Mexican Museum pays for an on-site teacher for the program and MHDC provides information about the tenants so that they can plan a program that gets the results that the tenants need. The Caritas Resident Manager provides access to the room and some on-site coordination for the program.	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Mariposa Gardens	Multi-Family	Yes	Mexican Museum and MHDC	Mexican Museum pays for an on-site art teacher for the program and MHDC provides information about the tenants so that they can plan a program that gets the results that the tenants need. MHDC Services coordinator also provides marketing and outreach and "room control" during the program.	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Plaza del Sol	Multi-Family	Yes	Mexican Museum and MHDC	Mexican Museum pays for an on-site art teacher for the program and MHDC provides information about the tenants so that they can plan a program that gets the results that the tenants need. MHDC Services coordinator also provides marketing and outreach and "room control" during the program.	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Betel Apartments	Multi-Family	Yes	Mexican Museum and MHDC	Mexican Museum pays for an on-site art teacher for the program and MHDC provides information about the tenants so that they can plan a program that gets the results that the tenants need. MHDC Services coordinator also provides marketing and outreach and "room control" during the program.	MHDC and Mexican Museum	Yes	Currently providing
After School Program	Good Samaritan	Multi-Family	Yes	Mexican Museum and MHDC	Mexican Museum pays for an on-site art teacher for the program and MHDC provides information about the tenants so that they can plan a program that gets the results that the tenants need. MHDC Services coordinator also provides marketing and outreach and "room control" during the program.	MHDC and Mexican Museum	Yes	Currently providing
Head Start Program	Rich Sorro Commons	Multi-Family	Yes	Headstart program is run by an external nonprofit. Funding for Head Start programs comes from Federal, State, and local government grants, as well as user fees based on income.	Provides affordable childcare and exposure for young children to education in order to prepare them for school.	Head Start	NA	Currently providing

Service Name	Location		Who provides service	MOU?	Currently Providing?
Attendance at ticketed events	Altamont H	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Plaza del S	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Maria Alici	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Abel Gonz Apartment	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Apollo Hot	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Rich Sorro Commons	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Bayview Commons	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Juan Pifarr	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Good Sam	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Del Carlo C	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Mariposa G	ing IHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing

Appendix A - Services Available at MHDC Sites
(Off-Site Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Attendance at ticketed events	Altamont Hotel	SRO	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Plaza del Sol	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Maria Alicia	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Abel Gonzalez Apartments	Senior	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Apollo Hotel	SRO	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Rich Sorro Commons	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Bayview Commons	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Juan Pifarre Plaza	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Good Samaritan	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Del Carlo Court	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Mariposa Gardens	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing

Service Name	Location		Who provides service	MOU?	Currently Providing?
Attendance at ticketed events	Colosimo	tling MHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Betel Apa	tling MHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Dunleavy	tling MHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Alcantara	tling MHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Esperanza Apartment	tling MHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	South Par Residence View and Hotels)	tling MHDC and	Community Access Ticket Service and MHDC staff	No	Currently providing
Operation Dream	Plaza del		San Francisco Police Department	N/A	One-time - not currently provided

Appendix A - Services Available at MHDC Sites
(Off-Site Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Attendance at ticketed events	Colosimo	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Betel Apartments	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Dunleavy Plaza	Multi-Family	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Alcantara Court	Senior	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	Esperanza Apartments	Senior	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Attendance at ticketed events	South Park Residences (Park View and Madrid Hotels)	SRO	No	Community Access Ticket Service and MHDC.	The organization provides tickets to events such as wrestling matches, Giants games, and Symphony performances. MHDC services coordinator inquires with residents and acquires and distributes tickets.	Community Access Ticket Service and MHDC staff	No	Currently providing
Operation Dream	Plaza del Sol	Multi-Family	No	Not funded by MHDC.	Youth invited to a barbeque at the Police Academy and attended the circus.	San Francisco Police Department	N/A	One-time - not currently provided

Service Name	Location		Who provides service	MOU?	Currently Providing?
Computer access	Mariposa (	duct	NA	NA	Currently providing
Computer access	Betel Apar	duct	NA	NA	Currently providing
Computer access	Good Sam	duct	NA	NA	Currently providing
Computer access	Rich Sorro Commons	duct	NA	NA	Currently providing
Elections presentations	Mariposa (	offer	Department of Elections	No	Currently providing
Elections presentations	Alcantara (	offer	Department of Elections	No	Currently providing
Elections presentations	Abel Gonz; Apartments	offer	Department of Elections	No	Currently providing
Elections presentations	Dunleavy F	offer	Department of Elections	No	Currently providing
Elections presentations	Juan Pifarr	offer	Department of Elections	No	Currently providing
Energy bill payment	Alcantara (	am s so	Economic Opportunity Council and MHDC staff	No	Currently providing
Energy bill payment	Abel Gonza Apartments	am s so	Economic Opportunity Council and MHDC staff	No	Currently providing
Energy bill payment	Esperanza Apartments	am s so	Economic Opportunity Council and MHDC staff	No	Currently providing
Energy bill payment	Dunleavy P	am s so	Economic Opportunity Council and MHDC staff	No	Currently providing

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Computer access	Mariposa Gardens	Multi-Family	Yes	Maintenance is paid for from operating and reserves funds for property.	Computers are available on site for use by tenants to conduct job searches or look for services.	NA	NA	Currently providing
Computer access	Betel Apartments	Multi-Family	Yes	Maintenance is paid for from operating and reserves funds for property.	Computers are available on site for use by tenants to conduct job searches or look for services.	NA	NA	Currently providing
Computer access	Good Samaritan	Multi-Family	Yes	Maintenance is paid for from operating and reserves funds for property.	Computers are available on site for use by tenants to conduct job searches or look for services.	NA	NA	Currently providing
Computer access	Rich Sorro Commons	Multi-Family	Yes	Maintenance is paid for from operating and reserves funds for property.	Computers are available on site for use by tenants to conduct job searches or look for services.	NA	NA	Currently providing
Elections presentations	Mariposa Gardens	Multi-Family	Yes	Not funded by MHDC.	Department of Elections comes in to talk about voting and offer work at polling places.	Department of Elections	No	Currently providing
Elections presentations	Alcantara Court	Senior	Yes	Not funded by MHDC.	Department of Elections comes in to talk about voting and offer work at polling places.	Department of Elections	No	Currently providing
Elections presentations	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Department of Elections comes in to talk about voting and offer work at polling places.	Department of Elections	No	Currently providing
Elections presentations	Dunleavy Plaza	Multi-Family	Yes	Not funded by MHDC.	Department of Elections comes in to talk about voting and offer work at polling places.	Department of Elections	No	Currently providing
Elections presentations	Juan Pifarre Plaza	Multi-Family	Yes	Not funded by MHDC.	Department of Elections comes in to talk about voting and offer work at polling places.	Department of Elections	No	Currently providing
Energy bill payment	Alcantara Court	Senior	Yes	Not funded by MHDC.	Economic Opportunity Council's Energy Assistance Program provides credits to low-income tenants on their energy bills so they don't have to pay the bill. Services Coordinator gets information, educates tenants, and assists in application process.	Economic Opportunity Council and MHDC staff	No	Currently providing
Energy bill payment	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Economic Opportunity Council's Energy Assistance Program provides credits to low-income tenants on their energy bills so they don't have to pay the bill. Services Coordinator gets information, educates tenants, and assists in application process.	Economic Opportunity Council and MHDC staff	No	Currently providing
Energy bill payment	Esperanza Apartments	Senior	Yes	Not funded by MHDC.	Economic Opportunity Council's Energy Assistance Program provides credits to low-income tenants on their energy bills so they don't have to pay the bill. Services Coordinator gets information, educates tenants, and assists in application process.	Economic Opportunity Council and MHDC staff	No	Currently providing
Energy bill payment	Dunleavy Plaza	Multi-Family	Yes	Not funded by MHDC.	Economic Opportunity Council's Energy Assistance Program provides credits to low-income tenants on their energy bills so they don't have to pay the bill. Services Coordinator gets information, educates tenants, and assists in application process.	Economic Opportunity Council and MHDC staff	No	Currently providing

Service Name	Location		Who provides service	MOU?	Currently Providing?
Haircuts and shaves	South Par Residence View and Hotels)	cuts	Bayview Barber College	No	Currently providing
Transportation services	Alcantara	en	ADA paratransit	No	Currently providing
Transportation services	Alcantara		Centro Latino	Yes	Currently providing
Transportation services	Abel Gonz Apartment	en	ADA paratransit	No	Currently providing
Transportation services	Esperanza Apartment	en	ADA paratransit	No	Currently providing
Transportation services	Dunleavy	en	ADA paratransit	No	Currently providing
Transportation services	Dunleavy		Centro Latino	Yes	Currently providing
Transportation services	Abel Gonz Apartments		Centro Latino	Yes	Currently providing
Transportation services	Esperanza Apartments		Centro Latino	Yes	Currently providing

Appendix A - Services Available at MHDC Sites
(Other Services)

Service Name	Location	Property Type	On-site?	Funded Through	Service explanation	Who provides service	MOU?	Currently Providing?
Haircuts and shaves	South Park Residences (Park View and Madrid Hotels)	SRO	Yes	Not funded by MHDC.	Bayview Barber College comes in weekly to give free haircuts and shaves to any resident that would like them.	Bayview Barber College	No	Currently providing
Transportation services	Alcantara Court	Senior	Yes	Not funded by MHDC.	Transportation provided to tenants by ADA paratransit when necessary and requested.	ADA paratransit	No	Currently providing
Transportation services	Alcantara Court	Senior	Yes	Not funded by MHDC.	Transportation provided to tenants by Centro Latino for shopping at a location determined by tenants.	Centro Latino	Yes	Currently providing
Transportation services	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Transportation provided to tenants by ADA paratransit when necessary and requested.	ADA paratransit	No	Currently providing
Transportation services	Esperanza Apartments	Senior	Yes	Not funded by MHDC.	Transportation provided to tenants by ADA paratransit when necessary and requested.	ADA paratransit	No	Currently providing
Transportation services	Dunleavy Plaza	Multi-Family	Yes	Not funded by MHDC.	Transportation provided to tenants by ADA paratransit when necessary and requested.	ADA paratransit	No	Currently providing
Transportation services	Dunleavy Plaza	Multi-Family	Yes	Not funded by MHDC.	Transportation provided to tenants by Centro Latino for shopping at a location determined by tenants.	Centro Latino	Yes	Currently providing
Transportation services	Abel Gonzalez Apartments	Senior	Yes	Not funded by MHDC.	Transportation provided to tenants by Centro Latino for shopping at a location determined by tenants.	Centro Latino	Yes	Currently providing
Transportation services	Esperanza Apartments	Senior	Yes	Not funded by MHDC.	Transportation provided to tenants by Centro Latino for shopping at a location determined by tenants.	Centro Latino	Yes	Currently providing

Information and Referral (Senior) services lowing:

Referral services - If a tenant needs acces... refers the tenant to an appropriate organiz...	a services coordinator cannot provide, MHDC staff ...o receive the service
Talking to the tenant, conferring with them...	which leads to referral in many cases)
Translation (as requested) - if a tenant car... appropriate language.	...ent or needs help writing the document in the
Conflict resolution - between tenants and t...	nd resident managers
Organizing monthly tenant meetings - serv... topics such as making the community safe...	s that are valid for tenants. Examples include domestic ...aff coordinates and external organization provides
Paperwork assistance - applying for Suppl... applications	ncome, Calworks, food stamps, and other benefits
Crisis intervention - If a tenant is having pr... help them come up with a way to resolve t...	...le, the services coordinator will meet with their case
Conferences with case managers - if a ten... managers to discuss the problem.	at the site or off-site - an example of an event is one that
Workshops - Organizations come in to disc... violence workshops and aromatherapy for...	...mily members or moved into a family-oriented facility,
Socialization - Services coordinator plans a... provided foods and music from other cultur...	ices offered for tenants located at the scattered
Family services - For tenants who wish to b... the services coordinators will help with this...	a services coordinator cannot provide, MHDC staff ...o receive the service

...available to scattered site tenants who seek out the

Information and Referral (Family) services

Referral services - If a tenant needs acces... refers the tenant to an appropriate organiz...	...ompass the following:
Talking to the tenant, conferring with them...	which leads to referral in many cases)
Translation (as requested) - if a tenant can... appropriate language.	a services coordinator cannot provide, MHDC staff ...o receive the service
Conflict resolution - between tenants and b...	nd resident managers
Crisis intervention - If a tenant is having pr... help them come up with a way to resolve t...	...ance abuse, services coordinators may intervene to
Organizing monthly tenant meetings - serv... topics such as making the community safe...	organize tenant meetings that will sometimes cover ...of personal relevance for the tenants.
Paperwork assistance - applying for Suppl... applications	ncome, Calworks, food stamps, and other benefits
Workshops - Organizations come in to disc... violence workshops and aromatherapy for...	s that are valid for tenants. Examples include domestic ...aff coordinates and external organization provides
Socialization - Services coordinator plans a... provided foods and music from other cultur...	
Family services - For tenants who wish to b... the services coordinators will help with this.	

Appendix A - Services Available at MHDC Sites

(Definition of Terms - Information and Referral Services)

Information and Referral (Senior) services encompass the following:

Referral services - If a tenant needs access to a service that a services coordinator cannot provide, MHDC staff refers the tenant to an appropriate organization or location to receive the service
Talking to the tenant, conferring with them about problems (which leads to referral in many cases)
Translation (as requested) - if a tenant cannot read a document or needs help writing the document in the appropriate language.
Conflict resolution - between tenants and between tenants and resident managers
Organizing monthly tenant meetings - services coordinators organize tenant meetings that will sometimes cover topics such as making the community safe and other topics of personal relevance for the tenants.
Paperwork assistance - applying for Supplemental Security Income, Calworks, food stamps, and other benefits applications
Crisis intervention - If a tenant is having problems with substance abuse, services coordinators may intervene to help them come up with a way to resolve the problem.
Conferences with case managers - if a tenant is having trouble, the services coordinator will meet with their case managers to discuss the problem.
Workshops - Organizations come in to discuss various topics that are valid for tenants. Examples include domestic violence workshops and aromatherapy for health. MHDC staff coordinates and external organization provides
Socialization - Services coordinator plans and hosts events at the site or off-site - an example of an event is one that provided foods and music from other cultures
Family services - For tenants who wish to be reunited with family members or moved into a family-oriented facility, the services coordinators will help with this.

Information and Referral (Family) services encompass the following:

Referral services - If a tenant needs access to a service that a services coordinator cannot provide, MHDC staff refers the tenant to an appropriate organization or location to receive the service
Talking to the tenant, conferring with them about problems (which leads to referral in many cases)
Translation (as requested) - if a tenant cannot read a document or needs help writing the document in the appropriate language.
Conflict resolution - between tenants and between tenants and resident managers
Crisis intervention - If a tenant is having problems with substance abuse, services coordinators may intervene to help them come up with a way to resolve the problem.
Organizing monthly tenant meetings - services coordinators organize tenant meetings that will sometimes cover topics such as making the community safe and other topics of personal relevance for the tenants.
Paperwork assistance - applying for Supplemental Security Income, Calworks, food stamps, and other benefits applications
Workshops - Organizations come in to discuss various topics that are valid for tenants. Examples include domestic violence workshops and aromatherapy for health. MHDC staff coordinates and external organization provides
Socialization - Services coordinator plans and hosts events at the site or off-site - an example of an event is one that provided foods and music from other cultures
Family services - For tenants who wish to be reunited with family members or moved into a family-oriented facility, the services coordinators will help with this.

Information and Referral (SRO) services encompass the following:

Referral services - If a tenant needs access to a service that a services coordinator cannot provide, MHDC staff refers the tenant to an appropriate organization or location to receive the service
Talking to the tenant, conferring with them about problems (which leads to referral in many cases)
Translation (as requested) - if a tenant cannot read a document or needs help writing the document in the appropriate language.
Conflict resolution - between tenants and between tenants and resident managers
Workshops - Organizations come in to discuss various topics that are valid for tenants. Examples include domestic violence workshops and aromatherapy for health. MHDC staff coordinates and external organization provides
Paperwork assistance - applying for Supplemental Security Income, Calworks, food stamps, and other benefits applications
Conferences with case managers - if a tenant is having trouble, the services coordinator will meet with their case managers to discuss the problem.
Socialization - Services coordinator plans and hosts events at the site or off-site - an example of an event is one that provided foods and music from other cultures
Family services - For tenants who wish to be reunited with family members or moved into a family-oriented facility, the services coordinators will help with this.

Information and Referral (Scattered Sites) services are services offered for tenants located at the scattered sites and encompass the following:

Referral services - If a tenant needs access to a service that a services coordinator cannot provide, MHDC staff refers the tenant to an appropriate organization or location to receive the service
Other services - Services that are provided at other sites are available to scattered site tenants who seek out the services through the MHDC offices.

Information and Referral (Bayview Commons) services encompass the following:

Talking to the tenant, conferring with them about problems (which leads to referral in many cases)
Referral services - If a tenant needs access to a service that a services coordinator cannot provide, MHDC staff refers the tenant to an appropriate organization or location to receive the service
Conflict resolution - between tenants and between tenants and resident managers
Crisis intervention - If a tenant is having problems with substance abuse, services coordinators may intervene to help them come up with a way to resolve the problem.
Organizing monthly tenant meetings - services coordinators organize tenant meetings that will sometimes cover topics such as making the community safe and other topics of personal relevance for the tenants.
Paperwork assistance - applying for Supplemental Security Income, Calworks, food stamps, and other benefits applications
Workshops - Organizations come in to discuss various topics that are valid for tenants. Examples include domestic violence workshops and aromatherapy for health. MHDC staff coordinates and external organization provides

	Property (ner ip)	Name of Affiliate (if affiliate is GP)	MHDC-related Ownership Percentage
1	Bayview Co	N/A	0.050%
2	Rich Sorro C	480 Valencia, Inc.	0.100%
3	Apollo Hotel	Apollo Housing, Inc.	0.100%
4	Juan Pifarre	1010 South Van Ness, Inc.	0.100%
5	Alcantara Cc	N/A	100%
6	Good Samar	Potrero Ave. Housing	1.000%
7	Altamont Ho	Altamont Hotel, Inc.	0.010%
8	Plaza del So	480 Valencia, Inc.	1.000%
9	Del Carlo Cc	Del Carlo Court, Inc.	1.000%
10	24th Street,	N/A	100%
11	Abel Gonzale Apartments	N/A	100%
12	23rd Street,	N/A	100%
13	23rd Street,	N/A	100%
14	Lily Street, 4	N/A	100%

[1] Property Typ

Multifamily
Senior - Affc
Scattered S
SRO - Supp
Leased - Fa

Appendix B - Schedule of MHDC Properties and Ownership Information

	Property name	Address	Year Completed/Acquired	Type of Housing[1]	# of Units	Owner name	Owner Type	General Partner (if partnership)	Name of Affiliate (if affiliate is GP)	MHDC-related Ownership Percentage
1	Bayview Commons	4445 3rd Street	2002	Multifamily	30	4445 Third Street Associates	Partnership	MHDC	N/A	0.050%
2	Rich Sorro Commons	150 Berry Street	2002	Multifamily	100	Mission Bay Affordable Housing	Partnership	MHDC Affiliate	480 Valencia, Inc.	0.100%
3	Apollo Hotel	420 Valencia Street	1999	Scattered Site	81	Apollo Development Assoc.	Partnership	MHDC Affiliate	Apollo Housing, Inc.	0.100%
4	Juan Pifarre Plaza	3101 21st Street	1998	Multifamily	30	1010 SVN Associates	Partnership	MHDC Affiliate	1010 South Van Ness, Inc.	0.100%
5	Alcantara Court	670 Valencia Street	1998	Senior	50	Mission Housing Development Property IV	MHDC Affiliate	N/A	N/A	100%
6	Good Samaritan	1290 Potrero Avenue	1997	Multifamily	20	Good Samaritan Associates	Partnership	MHDC Affiliate	Potrero Ave. Housing	1.000%
7	Altamont Hotel	3048 16th Street	1997	SRO	89	Altamont Hotel Associates	Partnership	MHDC Affiliate	Altamont Hotel, Inc.	0.010%
8	Plaza del Sol	440 Valencia Street	1995	Multifamily	59	480 Valencia Associates	Partnership	MHDC Affiliate	480 Valencia, Inc.	1.000%
9	Del Carlo Court	3330 Cesar Chavez	1993	Multifamily	25	Del Carlo Court Associates	Partnership	MHDC Affiliate	Del Carlo Court, Inc.	1.000%
10	24th Street, 2782-2786	24th Street, 2782-2786	1993	Scattered Site	3	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
11	Abel Gonzalez Apartments	1045 Capp Street	1992	Senior	30	Mission Housing Development Property III	MHDC Affiliate	N/A	N/A	100%
12	23rd Street, 3019-3021	23rd Street, 3019-3021	1992	Scattered Site	6	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
13	23rd Street, 3025-3029	23rd Street, 3025-3029	1992	Scattered Site	6	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
14	Lily Street, 426-440	Lily Street, 426-440	1990	Scattered Site	7	Mission Housing Development Corporation	MHDC	N/A	N/A	100%

[1] Property Types:

Multifamily - Affordable Low-Income Family Housing Projects Developed by MHDC
Senior - Affordable Senior Housing Projects Developed by MHDC
Scattered Site - MHDC Scattered Site Rehabilitation Developments for Low-Income Families and Seniors
SRO - Supportive SRO Housing for Formerly Homeless Adults
Leased - Facilities Owned by MHDC which are leased and operated by other CBOs Under Contract to DPH

	Property	ner ip)	Name of Affiliate (if affiliate is GP)	MHDC-related Ownership Percentage
15	Maria Alicia		Maria Alicia, Inc.	1.000%
16	Hotel Dolore		N/A	100%
17	16th Street,		N/A	100%
18	Park View H		N/A	100%
19	Madrid Hote		N/A	100%
20	Dunleavy Pl		N/A	100%
21	Moss Street,		N/A	100%
22	Capp Street,		N/A	100%
23	Mariposa Ga		Maria Alicia, Inc.	0.010%
24	18th Street,		N/A	100%
25	Bryant Stree		N/A	100%
26	15th Street,		N/A	100%
27	Rondel Place		N/A	100%
28	Colosimo		N/A	100%

[1] Property Typ

Multifamily
Senior - Aff
Scattered S
SRO - Supp
Leased - Fa

Appendix B - Schedule of MHDC Properties and Ownership Information

	Property name	Address	Year Completed/Acquired	Type of Housing[1]	# of Units	Owner name	Owner Type	General Partner (if partnership)	Name of Affiliate (if affiliate is GP)	MHDC-related Ownership Percentage
15	Maria Alicia	3090 16th Street	1989	Multifamily	20	Maria Alicia Associates	Partnership	MHDC Affiliate	Maria Alicia, Inc.	1.000%
16	Hotel Dolores	35 Woodward Street	1988	SRO	59	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
17	16th Street, 2945	16th Street, 2945	1987	Scattered Site	8	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
18	Park View Hotel	102 South Park	1987	SRO	40	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
19	Madrid Hotel	22 South Park	1987	SRO	45	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
20	Dunleavy Plaza	36 Hoff Street	1986	Multifamily	49	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
21	Moss Street, 70-74	Moss Street, 70-74	1984	Scattered Site	5	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
22	Capp Street, 890-896	Capp Street, 890-896	1984	Scattered Site	4	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
23	Mariposa Gardens	2445 Mariposa Street	1983	Multifamily	63	Mariposa Gardens II	Partnership	MHDC Affiliate	Maria Alicia, Inc.	0.010%
24	18th Street, 3434	18th Street, 3434	1983	Scattered Site	8	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
25	Bryant Street, 2800-2818	Bryant Street, 2800-2818	1983	Scattered Site	7	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
26	15th Street, 1637	15th Street, 1637	1983	Scattered Site	16	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
27	Rondel Place, 67-69	Rondel Place, 67-69	1983	Scattered Site	2	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
28	Colosimo	3290 25th Street	1982	Multifamily	11	Colosimo Apts., Inc.	MHDC Affiliate	N/A	N/A	100%

[1] Property Types:

Multifamily - Affordable Low-Income Family Housing Projects Developed by MHDC
Senior - Affordable Senior Housing Projects Developed by MHDC
Scattered Site - MHDC Scattered Site Rehabilitation Developments for Low-Income Families and Seniors
SRO - Supportive SRO Housing for Formerly Homeless Adults
Leased - Facilities Owned by MHDC which are leased and operated by other CBOs Under Contract to DPH

	Proper[...]ner [...]ip)	Name of Affiliate (if affiliate is GP)	MHDC-related Ownership Percentage
29	Esperanza	N/A	100%
30	Betel Apart[	N/A	100%
31	Valencia Ga	N/A	0.005%
32	Central Free C	N/A	N/A
33	5199 Missio	N/A	N/A
34	Aviva House	N/A	100%
35	Pomeroy Ho	N/A	100%
36	DePaul Hou	N/A	100%

[1] Property Typ[

Multifamily[
Senior - Aff[
Scattered S[
SRO - Supp[
Leased - Fa[

[2] 5199 Mission i[

	Property name	Address	Year Completed/Acquired	Type of Housing[1]	# of Units	Owner name	Owner Type	General Partner (if partnership)	Name of Affiliate (if affiliate is GP)	MHDC-related Ownership Percentage
29	Esperanza Apartments	3590 19th Street	1979	Senior	39	Mission Housing Development Property I	MHDC Affiliate	N/A	N/A	100%
30	Betel Apartments	1227 Hampshire Street	1976	Multifamily	50	Mission Housing Development Property II	MHDC Affiliate	N/A	N/A	100%
31	Valencia Gardens	1950 Mission Street	*Under Construction*	Multifamily	247	Valencia Gardens HSG LP	Partnership	MHDC	N/A	0.005%
32	Central Freeway Parcel C	Western Addition	*Under Construction*	Senior	100	Central Freeway Parcel C	N/A	N/A	N/A	N/A
33	5199 Mission[2]	5199 Mission Street	2003	Senior	37	N/A	N/A	N/A	N/A	N/A
34	Aviva House	1724-1726 Bryant Street	2003	Leased	2	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
35	Pomeroy House	2261-2263 Bryant Street	2003	Leased	2	Mission Housing Development Corporation	MHDC	N/A	N/A	100%
36	DePaul House	15 Bishop Street	2003	Leased	1	Mission Housing Development Corporation	MHDC	N/A	N/A	100%

Total Number of Housing Units   1351

[1] Property Types:

Multifamily - Affordable Low-Income Family Housing Projects Developed by MHDC
Senior - Affordable Senior Housing Projects Developed by MHDC
Scattered Site - MHDC Scattered Site Rehabilitation Developments for Low-Income Families and Seniors
SRO - Supportive SRO Housing for Formerly Homeless Adults
Leased - Facilities Owned by MHDC which are leased and operated by other CBOs Under Contract to DPH

[2] 5199 Mission is not owned by MHDC, but MHDC actively manages this property.

Contract or Grant Name	Service Site	Funding Source	...vided	Reason for Contract Termination
ISN Grant	Altamont, Apollo, and South Park residences	CCSF	...vided by on-site staff to ...sition from homelessness and ...helters to stabilized housing ...to provide generalized tenant ...ces and programs.	Current
South Park	South Park	CCSF	...uded economic & vocational ..., mental & physical health, ...werment & social integration, ...d outreach.	Current
Rich Sorro/Mission Bay	Rich Sorro/Mission Bay	CCSF	...uded intake and assessment, ...& economic empowerment, ...t services, case Management, ...uilding, and information and	Contract ended June 2005 and MHDC was not selected to renew the contract because its proposal did not receive the minimum points required for funding.
Citywide Families in SRO Collaborative	Not Site Specific, MHDC was to conduct work at SROs only (MHDC and Non-MHDC SROs)	CCSF	...ntract was to provide outreach ...community programs, peer ...ker trainings and advocacy, ...with SRO families to advocate ...of SRO families at City ...community meetings.	MHDC opted out of the contract and stated that they chose to concentrate on service coordination for residents of MHDC SROs and other supportive housing units.
Mission SRO Collaborative- SRO fire prevention and stabilization	Not Site Specific, MHDC was to conduct work at SROs only (Non-MHDC SROs)	CCSF	...SRO Collaborative was ...or the specific purpose of ...ants in the privately owned ...vith tenant organizing, ...ants and owners about fire ...ing one-on-one eviction ...nd supporting compliance with ...ient of building and fire codes.	MHDC opted out of the contract and stated that they chose to concentrate on service coordination for residents of MHDC SROs and other supportive housing units.
Tobacco-Free Project 1 (Prop A Tobacco Master Settlement funds)	Not Site Specific, but one MHDC site mentioned in contract	CCSF	...o work with appropriate policy ...s and residents in multi-unit ...opt, implement, and/or ...cco free policies governing ...living spaces, indoor ...s and/or outdoor areas of the ...e workplan indicates that one ...es was that MHDC staff was to ...n Pifarre building residents ...ily buildings and make ...to family buildings and policy ...ding their efforts to promote ...olicies.	MHDC received an award letter for Prop A Tobacco Free Neighborhoods contract in the amount of $155K for the period April 1, 2005-June 30, 2007. However, the MOU was not executed due to failure of MHDC to submit the required documents in a timely fashion.

Contract or Grant Name	Service Site	Funding Source	Funded by	2000	2001	2002	2003	2004	2005	2000-2005	Funding Paid For:	Service Provided	Reason for Contract Termination
ISN Grant	Altamont, Apollo, and South Park residences	CCSF	HSA	$67,834	$67,834	$67,834	$67,834	$67,834	$67,834	$407,004	Portions of the salaries and benefits of 3 service coordinators.	Services provided by on-site staff to facilitate transition from homelessness and transitional shelters to stabilized housing. The focus is to provide generalized tenant support services and programs.	Current
South Park	South Park	CCSF	HSA	$73,789	$73,789	$73,789	$73,789	$73,789	$77,376	$446,321	Portions of the salaries and expenses of 3 on-site staff persons to implement a variety of programs. Positions funded included Site Director (.5 FTE), Tenant Coordinator (1.0 FTE), and Resident Coordinator (.5 FTE).	Services included economic & vocational development, mental & physical health, tenant empowerment & social integration, education, and outreach.	Current
Rich Sorro/Mission Bay	Rich Sorro/Mission Bay	CCSF	HSA & SHIA	$0	$0	$118,075	$157,706	$189,215	$0	$464,996	Portions of the salaries and expenses of several MHDC positions, including a resident programs director, a tenant coordinator, an education coordinator, a resource specialist and a garden coordinator.	Services included intake and assessment, employment & economic empowerment, family support services, case Management, community building, and information and referral.	Contract ended June 2005 and MHDC was not selected to renew the contract because its proposal did not receive the minimum points required for funding.
Citywide Families in SRO Collaborative	Not Site Specific, MHDC was to conduct work at SROs only (MHDC and Non-MHDC SROs)	CCSF	DPH	0	0	$10,648	$32,352	$20,758	$0	$63,758	From the DPH funding that went to fund the collaborative, MHDC received around $63,758 from September 2002 to June 2005. The specific MHDC salaries and benefits funded by this contract included funding for an MHDC Project Coordinator $20,758 (0.7 FTE).	The latest contract was to provide outreach and referrals, community programs, peer outreach worker trainings and advocacy, and working with SRO families to advocate for the needs of SRO families at City hearings and community meetings.	MHDC opted out of the contract and stated that they chose to concentrate on service coordination for residents of MHDC SROs and other supportive housing units.
Mission SRO Collaborative- SRO fire prevention and stabilization	Not Site Specific, MHDC was to conduct work at SROs only (Non-MHDC SROs)	CCSF	DPH	$110,801	$112,728	$164,504	$114,504	$114,504	$0	$617,041	Mission SRO Collaborative was for the period of July 2004 to June 2005 and provided $250,000 for MHDC and its collaborators. Of the $250,000, $80,400 went to MHDC Personnel expenses and $34,104 went to MHDC operating expenses. The other two organizations in the collaborative, St. Peter's Housing Committee and Mission Agenda each received $67,748. The funding that went to MHDC for personnel expenses included a Mission SRO Collaborative Coordinator (1.0 FTE), an SRO Community Advocate (0.7 FTE), and a Director of Supportive Housing (0.3 FTE).	The Mission SRO Collaborative was established for the specific purpose of assisting tenants in the privately owned SRO hotels with tenant organizing, educating tenants and owners about fire safety, providing one-on-one eviction prevention, and supporting compliance with and enforcement of building and fire codes.	MHDC opted out of the contract and stated that they chose to concentrate on service coordination for residents of MHDC SROs and other supportive housing units.
Tobacco-Free Project 1 (Prop A Tobacco Master Settlement funds)	Not Site Specific, but one MHDC site mentioned in contract	CCSF	DPH (SF Study Center)	$66,000	$0	$50,000	$50,000	$26,627	$0	$192,627	Administered through the San Francisco Study Center, funding for the term of January 2004 to June 2004 included $11,359 for salaries and benefits, $13,025 for operating expenses, and $2,243 for indirect expenses for a total of $26,627. Positions funded included an MHDC Youth Community Health Organizing Project (YoCo-HOP) Coordinator (0.25 FTE) and the Resident Programs Associate Director (0.25 FTE).	MHDC was to work with appropriate policy making bodies and residents in multi-unit housing to adopt, implement, and/or enforce tobacco free policies governing indoor private living spaces, indoor common areas and/or outdoor areas of the complex. The workplan indicates that one of the activities was that MHDC staff was to work with Juan Pifarre building residents and other family buildings and make presentations to family buildings and policy makers regarding their efforts to promote smoke free policies.	MHDC received an award letter for Prop A Tobacco Free Neighborhoods contract in the amount of $155K for the period April 1, 2005-June 30, 2007. However, the MOU was not executed due to failure of MHDC to submit the required documents in a timely fashion.

Contract or Grant Name	Service Site	Funding Source	vided	Reason for Contract Termination
Tobacco-Free Project 2 (Smokeless Settlement funds)	Not Site Specific	CCSF	uded a community capacity ect to propose the adoption, on and/or enforcement of bacco free policies. This centered on smokeless policies like advocating to eless tobacco use in public Francisco including all softball diamonds and /or other identified locations.	MHDC received an award letter for Prop 99 Smokefree Multi-Unit Housing contract in the amount for 150K for the period April 1, 2005-June 30, 2007. However, the MOU was not executed due to failure of MHDC to submit the required documents in a timely fashion.
CDBG	Some MHDC sites and some non-MHDC sites	CCSF	uded multifamily and senior struction, supportive housing istance, single family housing , asset management, and site ivities.	Although $360,000 was reserved by MOH for MHDC for July 2004-June 2005, the contract was never executed by MOH because the funding was frozen by the Board of Supervisors. MHDC was not selected for FY 05-06 and is not scheduled to receive any of the CDBG funds during FY 05-06.
HOME Funds	Altamont & Apollo	CCSF	uded promoting community homic economic development and ership.	MOH is still awaiting documents from MHDC in order to execute the FY 04-05 contract for these services. MOH has yet to provide the $50,000 FY 04-05 grant amount to MHDC because the contract has not been executed. MOH has not granted MHDC any funds in FY 05-06.

Contract or Grant Name	Service Site	Funding Source	Funded by	2000	2001	2002	2003	2004	2005	2000-2005	Funding Paid For:	Service Provided	Reason for Contract Termination
Tobacco-Free Project 2 (Smokeless Settlement funds)	Not Site Specific	CCSF	DPH (SF Study Center)	0	0	$0	$0	$100,000	$0	$100,000	Administered through the San Francisco Study Center, funding for the term of January 2004 to February 2005 included $45,350 for salaries and benefits, $45,550 for operating expenses, and $9,100 for indirect expenses for a total of $100,000. Positions funded included $34,000 for an MHDC YoCo-HOP Coordinator and $2,280 for the MHDC Resident Programs Director.	Services included a community capacity building project to propose the adoption, implementation and/or enforcement of smokeless tobacco free policies. This contract also centered on smokeless tobacco free policies like advocating to change smokeless tobacco use in public parks in San Francisco including all baseball and softball diamonds and dugouts, and/or other identified locations.	MHDC received an award letter for Prop 99 Smokefree Multi-Unit Housing contract in the amount for 150K for the period April 1, 2005-June 30, 2007. However, the MOU was not executed due to failure of MHDC to submit the required documents in a timely fashion.
CDBG	Some MHDC sites and some non-MHDC sites	CCSF	MOH	$360,000	$360,000	$360,000	$360,000	$360,000	$0	$1,800,000	Part of the salaries and benefits of MHDC staff, contractual services, equipment, technical assistance, space rent, supplies, phone, travel & conferences, utilities, and other items.	Services included multifamily and senior building construction, supportive housing rehabilitation, asset management, and site feasibility activities.	Although $360,000 was reserved by MOH for MHDC for July 2004-June 2005, the contract was never executed by MOH because the funding was frozen by the Board of Supervisors. MHDC was not selected for FY 05-06 and is not scheduled to receive any of the CDBG funds during FY 05-06.
HOME Funds	Altamont & Apollo	CCSF	MOH	$50,000	$50,000	$50,000	$50,000	$50,000	$0	$250,000	MHDC Services Coordinator positions at Altamont and Apollo.	Services included promoting community stability, economic development and resident leadership.	MOH is still awaiting documents from MHDC in order to execute the FY 04-05 contract for these services. MOH has yet to provide the $50,000 FY 04-05 grant amount to MHDC because the contract has not been executed. MOH has not granted MHDC any funds in FY 05-06.

November 30, 2005

Ed Harrington
Controller
The City and County of San Francisco
Office of the Controller
1 Dr. Carlton B. Goodlett Place, Room 318
San Francisco, CA 94102-4694

Dear Mr. Harrington,

Mission Housing Development Corporation (MHDC) would like to thank the Office of the Controller, City Services Auditor for the opportunity to demonstrate our proper use and management of private and public funds in achieving MHDC's mission as a nonprofit housing developer providing safe, stable and affordable housing for our San Francisco community. Below we provide a general response to the audit findings of the City Services department. In accordance with your response guidelines, we have summarized our response to recommendations using the City Services Auditor Division Audit and Response Form.
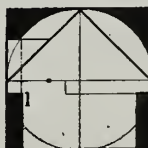
Overview

The City Audit confirms that no financial mismanagement of resources or loss of services have taken place within MHDC. However, MHDC was disappointed to find that the Audit fails to recognize the progress of the organization or its recent successes, such as MHDC's newest project, the 260-unit Valencia Gardens. Nevertheless, MHDC has concurred with each of the Audit's recommendations. MHDC is pleased to report that the organization has already begun on some of the recommendations, while additional financial resources are needed to complete the other recommendations. MHDC is confident that most of the recommendations will be implemented by end of the First Quarter of 2006, provided that funds become available.

No Material Management Abnormalities Identified

The final nine recommendations that resulted from the audit are a clear indication that MHDC's management of our property portfolio, coordination of our resident services and handling of our administrative affairs are consistent with applicable requirements of laws, regulations, contracts and grants. None of the City Services Auditors' recommendations determined that MHDC was not operating in compliance and in accordance with generally accepted auditing standards. The absence of this suggestion, in combination with the recently released external audit report performed by the certified public accounting firm of Bowers, Narasky and Daley, LLP, affirm that:

o Mission Housing Development's Board of Directors, MHDC staff, and Caritas, a wholly owned subsidiary of MHDC, have not engaged in malfeasance, fraud or misappropriation of funds from any public or private source;

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o MHDC currently provides a service delivery method through its Service Coordinators and the coordinated direct services of other CBOs that complies with our contractual requirements;

o MHDC has actively been involved over the past two years in enhancing and repairing all levels of management reporting and organizational restructuring to address management deficiencies that led MHDC's Board to remove its Executive Director in 2004; and

o MHDC is not precariously positioned in any way rendering it unable to meet its fiscal or service obligations.

Audit Recommendations Adopted

MHDC is entirely in agreement with the idea that organizational improvement is always desirable. Therefore, audit recommendations that suggest staffing open positions with skilled professionals; developing as management tools various consolidated lists; and continued implementation of management systems already initiated, are consistent with MHDC's objective to employ best practices in managing our organization. The recommendations made by the audit team are desirable, and in fact, should happen in any dynamic organization. MHDC's 35-year history of successful development and asset management of 1,500 units of housing attests to our commitment to excellence.

Audit Findings Questioned

While MHDC has concurred with all of the recommendations, we question some of the conclusions of the Audit, and are perplexed with the fact that the Audit failed to acknowledge or adequately describe operational systems and activities already in place. For instance, the auditors blur the timeline associated with their assessments by representing past fiscal conditions attributable to leadership under MHDC's terminated Executive Director, as though they are continuing conditions – despite irrefutable evidence of corrective system and staffing changes. As a result, the findings are not supported factually; ignore remediation put in place by the current MHDC administration; and result in unsubstantiated and unquantifiable allegations of risk.

MHDC Mission Is Unwavering

Mission Housing Development Corporation has a clear understanding of its purpose. MHDC's mission is to be a housing development, nonprofit corporation. Our goals are as clear as they were in the beginning:

o Facilitate the provision of decent, safe and affordable housing (including rental and homeownership units) to lower-income persons, with related facilities and services to improve the general welfare of such persons

o Encourage citizen participation in housing an community improvement programs

o Inform lower-income persons of available housing programs sponsored by public and other agencies

o Promote cooperation and coordination among lower-income persons, community groups, public agencies and private industry in securing decent housing and related facilities for lower-income families
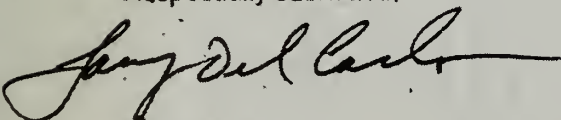
- o Provide technical assistance for the production and rehabilitation of decent and affordable housing for lower-income persons and to sponsor or produce housing for such persons, utilizing public or private assistance programs.
- o Raise the economic, educational and social levels of the residents of San Francisco including members of the minority community, who are substantiality unemployed, under-employed or whose income is below the federal poverty level.
- o Expand the opportunity available to such residents and groups to own, manage or operate business enterprises in economically depressed areas.
- o Assist such residents and groups in developing entrepreneurial and management skills necessary for the successful operation of the business enterprise.
- o Assist such residents and groups in obtaining financial support from other sources.
- o Promote acts as they are necessary or appropriate to accomplish any of the purpose for which this corporation is formed to the fullest extent as is permitted by law. (MHDC Articles of Incorporation, as amended in August 1987)

In 2004, the MHDC Board and successor management team immediately put in place corrective system and staffing changes in order to improve organizational performance. The changes were designed to address MHDC's fiscal expertise, delivery of services, accessing existing resources in the community, and other actions to identify and direct future strategies including:

- o Assessment of the overall organization including personnel, policies, programs and procedures
- o Adoption of new personnel policies and handbook
- o Creation of and fostering a prevailing atmosphere of cooperation with the signing of a contract with SEIU 790 in June 2004.
- o Implementation of changes in the structure and staffing of the departments—especially the new hiring of a CFO and staff accountants starting in late 2004, resulting in the successful production of budgets and management reports
- o Escalation of asset and portfolio management activities, that included convening a regular asset management committee and MHDC-Caritas Management Corporation (CMC) property managers' coordination meetings, and
- o Innovations in approach to services that resulted in more service MOUs with CBOs and providers.

As MHDC pursues its mission, goals and objectives, we recognize the need to assess how well we are addressing the needs of the community in which we do our work. As those needs change, MHDC will continue to review its mission and the various intermediate goals, objectives and methodologies used to carry out that mission.

Respectfully submitted,

Larry Del Carlo
President

City Services Auditor Division
Audit Recommendation and Response Form

Recommendation	Response (Choose: Concur, Do Not Concur, or Partially Concur)	If "do not concur" or "partially concur," please explain below:	Implementation plan and expected date
1) MHDC should strengthen its asset management capacity by hiring and/or retaining enough sufficiently skilled finance and asset management staff to track, analyze, and report on all of its operations, including those affiliate organizations over which it has control by virtue of controlling Board membership and the services of MHDC's wholly owned subsidiary management company.	Concur		• MHDC will hire a skilled asset management professional by the end of the 1st Qtr. of 2006. • MHDC will immediately begin a search for a finance expert who will increase the organization's capacity and standards in fiscal management.
2) MHDC should finish implementing the recommendations communicated to it by its external auditors in their 2003 management letter regarding management of its housing assets.	Concur		• To date, MHDC has implemented 5 of the 6 recommendations for improving asset accounting/reporting requirements contained in the 2003 management comments to the audited financial statements. • Implementation of the one remaining recommendation will be completed in the 1st Quarter 2006.

City Services Auditor Division
Audit Recommendation and Response Form

Recommendation	Response (Choose: Concur, Do Not Concur, or Partially Concur)	If "do not concur" or "partially concur," please explain below:	Implementation plan and expected date
3) MHDC should develop its own set of policies and procedures pertaining to managing and monitoring its properties. In doing so, MHDC should take a more active role in shaping the contents of monthly management reports of its properties in a manner that reflects its needs as asset manager, identifying the information it needs to effectively monitor its assets. Once it has determined what this information consists of, MHDC should ensure that Caritas is providing that information. This could involve changing management agreements for the properties or even the master agreement between Caritas and MHDC.	Concur		MHDC will continue to review the monthly reports of Caritas*. Although MHDC has its established practices and procedures for actively managing its assets, a policies and procedures manual will be produced. *This will be completed in the 2nd qtr. of 2006.* MHDC will continue to identify improvement areas and set policies, and plan for achieving operating efficiencies, reporting, and portfolio assessment. *This is an ongoing activity.* *The CMC Monthly report to MHDC includes: 1. A narrative report with highlights of extraordinary expenses and important management, occupancy, maintenance and security issues, 2. Monthly Status Report, 3. Schedule of Disbursements, 4. Operating Statement, 5. Balance Sheet, 6. Schedule of Accounts Payable and 7. Tenant Register

City Services Auditor Division
Audit Recommendation and Response Form

Recommendation	Response (Choose: Concur, Do Not Concur, or Partially Concur)	If "do not concur" or "partially concur," please explain below:	Implementation plan and expected date
4) MHDC should create a listing or use the listing developed during the audit process of all services provided and available at each housing site, including who provides the service and the sources of funding for the positions or service.	Concur		*Implemented.* MHDC has created multiple lists and summaries of services offered at each building site, their funding sources and personnel involved, as well as the following controls: ○ *Two service matrices or schedules* that track more than 120 types of possible service needs as self-identified by residents, ○ A *daily services log* in which each resident contact and type is recorded.

City Services Auditor Division
Audit Recommendation and Response Form

Recommendation	Response (Choose: Concur, Do Not Concur, or Partially Concur)	If "do not concur" or "partially concur," please explain below:	Implementation plan and expected date
5) MHDC should develop a formal, written and agreed upon system to communicate the specific roles and responsibilities of the services coordinators. One way of achieving this is by updating job descriptions so that each services coordinator has clear definitions of the specific roles and responsibilities involved in their positions. Alternatively, MHDC could provide clarity by putting together written expectations of the specific services provided, locations, and duties of each services coordinator. Such a listing should be made available to both management and staff so that there is a clear and consistent understanding of the services and roles provided by each of the services coordinators.	Concur		Although MHDC has a job description for the Service Coordinators, we will update this so that each coordinator will have a clear and consistent understanding of what is expected of him/her.

This will begin immediately and will be completed by the end of February, 2006. |

City Services Auditor Division
Audit Recommendation and Response Form

Recommendation	Response (Choose: Concur, Do Not Concur, or Partially Concur)	If "do not concur" or "partially concur," please explain below:	Implementation plan and expected date
6) MHDC should develop a listing of the loan and regulatory requirements for service provision for each of its properties. Used in conjunction with the previously mentioned listing of services available at its sites, MHDC would be able to affirmatively ensure compliance with the service mandates of regulatory and loan agreements.	Concur		*Implemented.* MHDC has a written summary of the mandatory and program requirements under existing loans and grants.
7) MHDC should enter into MOUs or other appropriate agreements with all entities that provide services at its sites.	Concur		MHDC has at present 9 MOUs, of which 5 were not reflected in the Audit report. It is MHDC's intention to enter into an MOU with every service provider which has presence in its buildings.

City Services Auditor Division
Audit Recommendation and Response Form

Recommendation	Response (Choose: Concur, Do Not Concur, or Partially Concur)	If "do not concur" or "partially concur," please explain below:	Implementation plan and expected date
8) MHDC should explore the possibility of establishing a nonprofit affiliate that would manage services at MHDC sites in the same structural capacity that Caritas manages MHDC properties - with shared Board members, a separate executive officer, and specific work to be accomplished.	Concur		MHDC has previously considered this option and is willing to have the Board of Directors reconsider it.
9) MHDC Board of Directors and management should clarify the mission and purpose of the organization and ensure that all internal reports and documents; the articles of incorporation; grant, contract, and loan agreements; as well as external information such as the MHDC website, have a consistent purpose and mission.	Concur		Beginning immediately, MHDC will look for opportunities to integrate its mission statement and goals, into pertinent documents, including our website.